



## Reports Manual

A Comprehensive listing of the reports available in Arkansas WebIZ, the purpose of each report, input criteria, output values and common uses for each report.

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## **INTRODUCTION**

This document describes each of the reports available in the Arkansas WebIZ Immunization Information System. Information about report purpose, input criteria, and output format for each report is described in detail in this document. The sections within this document mirror the Reports/Forms categories in the Arkansas WebIZ system.

Note that this document describes reports that are not accessible by all users. Please contact the Arkansas WebIZ Help Desk (1-800-574-4040, or [ADH.ArkansasWebIZ@Arkansas.gov](mailto:ADH.ArkansasWebIZ@Arkansas.gov)) if you have questions about accessing any of the reports.

This document will be updated as reports are added, deleted, and modified, or as they are moved between report categories. Changes to the document will be logged in the Change History section above.

## **GENERAL INFORMATION**

The following sections describe some of the report-specific features that are similar across most reports available through the Arkansas WebIZ system.

### **DEFAULT CLINIC**

For reporting purposes, each patient in the registry has a default or home clinic. This clinic “owns” the patient for reporting purposes. This does not mean that the patient cannot receive services at other clinics; rather the default/home clinic is responsible for functions such as reminder/recall and will have that patient included in its reports for statistical purposes.

*Note: A patient’s default clinic may be updated when they receive vaccination services at a clinic.*

### **INPUT CRITERIA**

Many of the reports in the system are generated based on user-defined criteria. From the Reports screen, the user selects the link to the appropriate report. At this point, a Report Selection Criteria screen is displayed. All criteria in bold must be entered. Rather than repeating the description of these fields, the most common report criteria are described here.

- **Provider** – This list represents the list of providers that the user currently has access to. This is determined by the user’s “reporting level” indicated on the User Security screen in the Administration module. For users who have access to “UNRESTRICTED (ALL PROVIDERS)”, any provider active in the registry may be selected, or none if the user needs the results to encompass the entire registry. For users who have access to “PROVIDER LEVEL SECURITY” OR “CLINIC LEVEL SECURITY”, the list will contain only those providers that the user is associated with and the user must choose one of those providers. Note: Selecting a provider in this list changes and/or limits the list of clinics

that will be available in the clinic list. Depending on the user's access level, this may be required criteria.

- **Clinic** – This list represents the list of clinics that the user is associated with as defined by the provider selected on the Arkansas WebIZ home screen. Depending on a user's access, this field may be a required field to request the report.
- **Provider Category** – This lists the different categories of providers defined in the registry (e.g. Pediatrician, Local Public Health Agency...). Note that this criterion is usually only available for those users who have the reporting level of "UNRESTRICTED (ALL PROVIDERS)".
- **County** – This is a list of Arkansas counties in Arkansas WebIZ. If this criterion is used, only those clinics residing in the county chosen will have their patients included in the report.
- **Immunization Date Range** – This represents a range of vaccination service dates and must be a valid date range. Normally when this criteria is used, only patients who have had vaccinations in the given date range are included in the report. This is normally required for report generation.
- **Funding Source** - This is a list of funding sources available in Arkansas WebIZ. This only applies to those providers capturing funding source information as part of entering inventory associated with a vaccine.

*Note: There are some reports, most commonly documents listed under Forms/Informational Documents, which do not have report selection criteria.*

## **REPORT RESULTS**

The results of most reports in the system are displayed in a popup window. In most cases, the system will not open a new window if there's already a previous report window open. If you are running a report and do not see a new window displayed on your screen, the most likely causes are:

- You have a popup blocker that you need to configure to allow pop-ups from the Arkansas WebIZ application.
- You have a report window already open (maybe behind your application window). Close that window and then click the Run Report button again.

Reports that are requested and have no results usually return a generic report displaying the input criteria used and a message that there are no results matching the criteria.

## **PATIENT RECORDS**

The following sections describe each of the reports that are available in the Patient report category. For each report, notes are included for the purpose, input criteria, and output formats.

### ***OFFICIAL IMMUNIZATION RECORD***

#### PURPOSE

- This report generates an official immunization record for the indicated patient that can then be printed.

#### INPUT CRITERIA

- Patient – Use the magnifying glass icon to open a popup to enter search criteria and click the Search button. Double-click the desired patient to select. (If you have an active patient selected, it will be the default value when displaying the screen.)

#### OUTPUT

- Output Format: PDF document
- Patient information including name, unique patient ID in parentheses, and DOB
- Select precautions/contraindications and/or vaccine reactions (adverse reactions)
- Vaccines refused
- List of the patient's vaccinations including vaccine type, date, administering clinic, and date next due

### ***PATIENT ADMINISTRATIVE RECORD***

#### PURPOSE

- This report generates a more detailed immunization record for the indicated patient that can then be printed. Most likely used as an administrative record for the office.

#### INPUT CRITERIA

- Patient – Use the magnifying glass icon to open a popup to enter search criteria and click the Search button. Double-click the desired patient to select. (If you have an active patient selected, it will be the default value when displaying the screen.)

#### OUTPUT

- Output Format: PDF document
- Patient information including name, unique patient ID in parentheses, phone number, age (yy years, mm months, dd days format), DOB, gender, ethnicity, address, physician, VFC eligibility, and race
- List of the patient's vaccinations including vaccine type, dose number within the applicable vaccine series, date, age as of the vaccination date, administering clinic, administering provider, site, manufacturer, lot number, funding source, VIS effective date and date VIS given

## ***VACCINE DOCUMENTATION/CONSENT FORM***

### PURPOSE

- The purpose of the report is to generate a form with information similar to the Patient Administrative Record report. However, if vaccinations have been added but not administered, the inventory information for these vaccinations is shown in “worksheet” form.

### INPUT CRITERIA

- **Patient ID.** Use the magnifying glass icon to open a popup and search for the desired patient. (If you have an active patient selected, it will be the default value when displaying the screen.)

### OUTPUT

- Output Format: PDF document
- Patient ID
- Patient Name
- Patient Date of Birth
- Patient Gender
- Patient’s Precautions/Contraindications
- Past Adverse Reactions
- List of the patient’s vaccinations, including date, vaccine type, dose, etc.

## ***IZ HISTORY/RISK/RECOMMENDATIONS***

### PURPOSE

- The purpose of this report is to display the results of the Recommender (just as if the Recommend button on the Immunization Home screen had been selected).

### INPUT CRITERIA

- Patient – – Use the magnifying glass icon to open a popup to enter search criteria and click the Search button. Double-click the desired patient to select. (If you have an active patient selected, it will be the default value when displaying the screen.)

### OUTPUT

- Output Format: PDF document or HTML – If the user does not need to print the report, an HTML screen format is available.
- The output includes:
  - Patient information including name, unique patient ID in parentheses, DOB, and patient’s precautions/contraindications,
  - Patient’s Immunization History, including the following for each immunization:
    - Vaccine Type

- Dose number within the associated vaccine series
- Date
- Patient's age (in yy years, mm months, dd days) as of the immunization date
- Administering Clinic
- Patient's age (in number of days) as of the immunization date
- Indication if the Recommender algorithm identified the immunization as invalid
- Recommended vaccinations for today
- Future recommended vaccinations (assuming all vaccinations recommended for today have been administered).

## **FORMS/INFORMATIONAL DOCUMENTS**

The following sections describe each of the reports that are available in the Forms/Informational Documents report category. For each report, notes are included for the purpose, input criteria, and output formats.

### ***ACIP CHILD IMMUNIZATION SCHEDULE***

#### PURPOSE

- Displays a copy of the latest ACIP Child Immunization Schedule.

#### INPUT CRITERIA

- None

#### OUTPUT

- Output Format: PDF document

### ***ACIP ADOLESCENT IMMUNIZATION SCHEDULE***

#### PURPOSE

- Displays a copy of the latest ACIP Adolescent Immunization Schedule.

#### INPUT CRITERIA

- None

#### OUTPUT

- Output Format: PDF document

## ***ACIP CHILD AND ADOLESCENT CATCH-UP IMMUNIZATION SCHEDULE***

### PURPOSE

- Displays a copy of the latest ACIP Child and Adolescent Catch-up Immunization Schedule.

### INPUT CRITERIA

- None

### OUTPUT

- Output Format: PDF document

## ***ACIP ADULT IMMUNIZATION SCHEDULE***

### PURPOSE

- Displays a copy of the latest ACIP Adult Immunization Schedule.

### ***INPUT CRITERIA***

- None

### OUTPUT

- Output Format: PDF document

## ***PROVIDER AND CLINIC INFORMATION***

### PURPOSE

- This report generates a listing or directory of all providers and clinics in the system, dependent on user permissions. Users will be able to generate a list of providers/clinics to which they are associated in Arkansas WebIZ.

### INPUT CRITERIA

- Report Type – Indicate whether to only include providers or to include the clinic(s) associated with each provider as well.
- County – Optional filter to restrict only those providers located within the indicated county (depends on user permissions).
- Available Programs – Optionally restrict the results to include only providers associated with the indicated program(s). There is currently only one program (Immunizations).
- Available Provider Types – Optionally restrict the results to include only providers associated with the indicated provider types.
- Include Inactive? – Checking this box will list any providers and clinics that have been marked as inactive.

- Include Inventory Locations – Checking this box will list inventory locations that have been created for the Type 3 providers in the system.
- Include only VFC providers – Checking this box will list only VFC providers.
- Include only non-VFC providers – Checking this box will list only non-VFC providers.

#### OUTPUT

- Output Format: PDF document
- Provider information including: provider name, address, status, VFC provider indication, provider type, phone number, fax number and contact person.
- If clinics/locations are included, the information listed includes clinic name, clinic code, status, address, phone number, fax number and clinic service types.

### ***PRODUCT LISTING***

#### PURPOSE

- This report generates a list of vaccine manufacturers and vaccines based on selected criteria.

#### INPUT CRITERIA

- Manufacturer
- Vaccine

#### OUTPUT

- Output Format: PDF document or Extract file (e.g. text file or Excel). To save the report as an Excel file, use a comma as your delimiter. To save the report as a text file, use a pipe as the delimiter.
- Information included in the results: manufacturer, manufacturer code, vaccine, status, brand name, and NDC number.

### ***VACCINE INFORMATION STATEMENTS (VIS)***

#### PURPOSE

- Displays a copy of the most current VIS for the vaccine selected.

#### INPUT CRITERIA

- User can select to show Vaccine Information Statements for all vaccines or only child vaccines.
- Click the print icon to display the corresponding VIS.

#### OUTPUT

- Output Format: PDF document

## **PATIENT MANAGEMENT REPORTS**

The following sections describe each of the reports that are available in the Patient Management report category. For each report, notes are included for the purpose, input criteria, and output formats.

### ***BIRTH VACCINATIONS***

#### **PURPOSE**

- This report generates a list of patients that have (or have not) received a birth dose of the vaccine series selected.
- Deleted patients are not included in the results.

#### **INPUT CRITERIA**

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- County of Residence – See notes on county in the General Information section above. This is a permission-based field. Not all users will have access to this search criterion.
- DOB Date Range
- Number of Days from DOB – The maximum number of days allowed between the vaccination date and the patient’s DOB in order for the vaccination to be considered a “birth dose”.
- Vaccine Series – Restrict the list to only patients who have received a vaccination that belongs to the indicated group(s).
- Report Type
  - Patients who received the vaccine series selected.
  - Patients who did not receive the vaccine series selected.

#### **PROCESSING**

- The report lists the patients that have (or have not) received a birth dose of the vaccine series selected that are associated to the indicated provider/clinic.
- Deleted patients are not included in the results.
- Opted out patients are not included in the results.
- If patient birth time and vaccination administration time are indicated then the report will also include a filter based on hours administered after birth.

#### **OUTPUT**

- Output Format: PDF document
- Patient name, unique patient ID in parentheses, DOB, vaccine series and birth vaccination information for any patients matching the indicated criteria

## ***PATIENT DETAIL WITH SERVICES***

### PURPOSE

- Generates a listing of the patient vaccinations that were administered by the selected provider/clinic and that meet the indicated search criteria. This report generally shows the details of patients that have received vaccinations in a specific provider/clinic (does not look at historical vaccinations).

### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- Vaccination Date Range – See notes on vaccination date range in the General Information section above.
- DOB Date Range – Minimum and maximum date of birth (DOB) to be included in the results.
- Funding Source – See notes on funding source in the General Information section above.

### PROCESSING

- The intent of this report is to generate a list of any patients that have received vaccinations from the provider/clinic specified along with meeting the indicated criteria. This can be helpful when trying to identify vaccinations that may need to be reviewed or updated for a particular patient.
- Opted out patients are not included in the results

### OUTPUT

- Output Format: PDF document or Extract file (e.g. text file or Excel). To save the report as an Excel file, use a comma as your delimiter. To save the report as a text file, use a pipe as the delimiter.
- Patient information including name, unique patient ID in parentheses, and DOB
- Default Provider/Clinic
- Vaccination details including vaccination date, clinic, vaccine type, lot number, funding source, historical vaccination, invalid vaccination
- Created By – Lists the user who created the record
- Last Updated By – Lists the user who last updated the record
- Totals (at the bottom of the report): patients, administered, historical, and invalid vaccinations

## ***PATIENT LIST BY INSURANCE SOURCE***

### PURPOSE

- This report generates a list of patients grouped by their insurance source.
- The Active Only indicator is used to only display active insurance sources when an inactive one may have been assigned to a patient long ago and never been changed.
- The report allows some additional criteria such as schedule, occupation, and precautions/contraindications associations to further restrict the output.
- The Active Patients Only restriction implies that the patient must have been open in the IZ program during the date range specified.
- This can be an entire roster of patients or just those patients vaccinated during a given range.
- *Note: A patient will be listed for any associated insurance source and not just that marked as the primary insurance source.*

### INPUT CRITERIA

- Insurance Source – This is a list of all sources of insurance in Arkansas WebIZ.
- Active Only? – Only include active insurance sources in the results.
- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- Recommender Schedule – This is a list of all Recommender Schedules defined in Arkansas WebIZ.
- Active Patients Only? – Only include active patients in the results.
- Occupation – This is a list of all occupations defined in Arkansas WebIZ. This is not widely used in Arkansas WebIZ and should be left blank.
- Precautions/Contraindications – This is a list of all precautions/contraindications defined for the registry.
- Vaccination Date Range – See notes on vaccination date range in the General Information section above.
- Complete Roster – If the roster of patients regardless of vaccination history is required, this should be checked instead of providing a vaccination range.

### OUTPUT

- Output Format: PDF document
- Health Insurance Source
- Patient information including patient name, DOB, SSN, insurance, insurance ID, primary insurance indicator
- Total count of patients and vaccinations by insurance source.

## ***PATIENT LIST/COUNTS BY CLINIC REPORT***

### PURPOSE

- This report generates a count (or list) of patients served by the clinic and broken down by age group. The purpose of the report is to indicate the number of patients serviced by a clinic during a given period.
- The patients included in the report correspond to the provider and clinic chosen and must have been vaccinated within the date ranges specified. *Note: The vaccinations must have been administered at the clinic and not simply be historical vaccinations.*
- *Note: This report counts the number of patients given vaccinations at the clinic between the dates specified. This actually means that a patient could be counted twice if they cross age boundaries for the reported date range.*

### INPUT CRITERIA

- Report Type – Indicate whether the output should be Summary level (e.g., consist only of counts) or Detailed (e.g., include a list of the patients being counted).
- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- Funding Source – See notes on funding source in the General Information section above.
- Provider Category – See notes on provider category in the General Information section above. This is a permission-based criterion. Not all users will have access to this field.
- County – See notes on county in the General Information section above. This is a permission-based criterion. Not all users will have access to this field.
- Vaccination Date Range – See notes on vaccination date range in the General Information section above.

### OUTPUT

- Output Format: PDF document
- The report lists counts of patients by age groupings. The age groupings are currently:
  - Less than 1, 1, 2, 3 – 5, 6, 7 – 10, 11 – 12, 13 – 18, 19 – 24, 25 – 44, 45 – 64, 65 and over, and Age Unknown
- Summary totals are given for the report as a whole and by clinic, if indicated.
- A detailed list of patients comprising the report can be requested by indicating a detail report from the criteria screen. This includes the unique patient ID, last name, first name, middle initial and DOB.

## ***PATIENT REMINDER RECALL***

- This report, due to its complexity and size, is discussed in a separate document.

## ***PATIENT ROSTER***

### PURPOSE

- This report generates a list of patients (current roster) grouped by their default provider/clinic.
- The report is sorted by patient status and then last name and first name. This allows the active patients to be sorted to the beginning of the report and the list of inactive patients to follow.
- Deleted patients are not included.

### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- County of Residence – See notes in the General Information section above.
- Group Report Totals by:
  - Provider/Clinic – Use this option to get a list of patients grouped by their default provider and clinic.
  - County – Use this option to get a list of patients grouped by the county set in their address.
- Vaccination Date Range – See notes on vaccination date range in the General Information section above.
- Age Range From/To – Restrict the list of patients to only those patients whose age is within these parameters as of the date the report is generated.
- Age UOM – Indicate the Unit of Measure (e.g., Month or Year) used to interpret the Age Range values.
- Option to Exclude Patients with Less than 2 non-Influenza/H1N1 Vaccinations

### OUTPUT

- Output Format: PDF document
- Patient information including unique patient ID, last name, first name, age (as of the date the report was generated), and DOB.
- Last vaccination date and status (Active = Open in IZ program; Inactive = Closed out of IZ program) of every patient meeting the search criteria.
- Summary totals by provider/clinic and report.

## ***PATIENTS BY BIRTH FACILITY TYPE***

### PURPOSE

- The purpose of this report is to generate a list of patients who received their first vaccination from a clinic during the specified date range.

### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on clinic in the General Information section above.
- County of Residence - See notes in the General Information section above.
- DOB Date Range - Optionally restrict the list of patients to only those patients whose date of birth is within these parameters as of the date the report is generated.
- Birth Facility Type - Optionally restrict the list of patients by location of birth by facility types.
- Include Patients without a Birth Facility Type? - Check this box to include patients without a birth facility type.

#### PROCESSING

- The intent of the report is to provide a list of all patients by birth facility type.
- The results are grouped by their Default Provider, Clinic, and County.
- Opted out patients are not included.
- Deleted patients are not included.

#### OUTPUT

- Output Format: PDF document
- Default Provider/Clinic/County, Patient ID, Last Name, First Name, DOB, Age at time of report, and Birth Facility Type of every patient meeting the search criteria.
- Summary of Patients by Provider, Clinic, County, Birth Facility Type and as a whole report.

### ***PATIENTS FIRST SEEN***

#### PURPOSE

- This report generates a list of patients who received their first vaccination from a clinic during the specified date range.
- The results are grouped by their Default Provider and Clinic.

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- County of Residence – See notes in the General Information section above.
- Vaccination Date Range – See notes on vaccination date range in the General Information section above.
- Age Range – Optionally restrict the list of patients to only those patients whose age is within these parameters as of the date the report is generated.

#### OUTPUT

- Output Format: PDF document
- Patient information including unique patient ID, name, and DOB

- Vaccination information including date first seen (i.e., date of first vaccination from their current default provider/clinic; date last seen (i.e., date of most recent vaccination from their current default provider/clinic; and status (Active = Open in IZ program; Inactive = Closed out of IZ program) of every patient meeting the search criteria.

### ***PATIENTS WITH VACCINE REFUSALS***

#### **PURPOSE**

- This report generates a list of patients who refused or deferred a vaccination based on user-defined criteria.
- The results are sorted alphabetically by patient last and first name.

#### **INPUT CRITERIA**

- Provider – See notes on provider in the General Information section above.
- Vaccine – Leave blank to pull any vaccines that meet your selection criteria or select a specific vaccine.
- Refusal Date Range – See notes on vaccination date range in the General Information section above
- Age at Time of Refusal Range – Optionally restrict the list of patients to only those patients whose age is within these parameters as of the date the report is generated.

#### **OUTPUT**

- Output Format: PDF document or Extract file (e.g. text file or Excel). To save the report as an Excel file, use a comma as your delimiter. To save the report as a text file, use a pipe as the delimiter.
- Patient information including name, unique patient ID in parentheses, DOB, and age
- Vaccine refusal information including note date, vaccine refused and refusal reason.
- Summary totals by number of patients by vaccine refused and number of patients by refusal reason.

### ***VACCINE RECALL***

#### **PURPOSE**

- This report generates a list of patients that need to be notified of a vaccine recall based on having been administered a vaccine with the lot number specified in the criteria.
- The Lot Number search is a “contains” search. In other words, any lot number containing the characters entered here will be returned.

## INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- Report Output:
  - Recalled Vaccinations by Vaccination Clinic – Selecting this option will identify all patients who received a vaccination (matching the other criteria) where the vaccination is associated with the specified clinic.
  - Recalled Vaccinations by Patient’s Default Clinic - Selecting this option will identify all patients who received a vaccination (matching the other criteria) where the patient belongs to the indicated provider and clinic.
- Lot Number – Lot of the vaccine being recalled
- Vaccine – Optionally restrict the results to only a specific vaccine.
- Funding Source – See notes on funding source in the General Information section above.
- Manufacturer – Optionally restrict the results to only those produced by a specific manufacturer.
- Expiration Date Range – Optionally restrict the results to only those where the vaccine expiration data is within this range.

## OUTPUT

- Output Format: PDF document or Extract file (e.g. text file or Excel). To save the report as an Excel file, use a comma as your delimiter. To save the report as a text file, use a pipe as the delimiter.
- Patient information including name, unique patient ID in parentheses, DOB, phone, contact information, and address.
- Vaccine information including vaccination date, vaccination clinic, vaccine type, lot number, expiration date, and funding source.

## **SCHOOL NURSE**

### ***STUDENT GRADE ADVANCEMENT***

This is an interactive screen that allows school users to "bump" students from one grade to the next. A user first searches for students with open enrollments for the school district/school specified and the grade level specified. Then they can check all or just some of the students and then select the "Update" button to automatically update their grade to the next grade level.

### ***BUTTONS AND NAVIGATION***

- Search - Use this button to search for students that meet the search criteria entered.
- Update - Use this button to "bump" students to the next grade level after students are selected.
- Cancel - Use this button to return to the previous page without saving any changes.

### ***STUDENT ROSTER***

#### **PURPOSE**

- This report generates a list or student roster grouped by school district/school or county.

#### **INPUT CRITERIA**

- School District – List of all school districts in Arkansas
- School – List of schools that the user is associated with as defined by the school district selected on the home screen of the Arkansas WebIZ School Application.
- County of Residence – See notes in the General Information Section above
- Report output:
  - Group Report Totals by School District/School – Selecting this option will identify all students enrolled in the specified school district and school.
  - Group Report Totals by County – Selecting this option will identify all students enrolled in any school in the specified county. *NOTE: Students are not broken down by Schools within the specified county.*
- Enrollment Open as of Date – Restrict the list of students to only those students with an open enrollment in a school as of the specified date.
- Age Range – Optionally restrict the list of patients to only those patients whose age is within these parameters as of the date the report is generated.

#### **OUTPUT**

- Output Format: PDF Document
- Patient information including: name, unique patient ID in parentheses, age, and DOB
- School information including: School District/School or county (determined by which report output selected), enrollment date, un-enrollment date, and most recent FERPA date.

## **COVERAGE STATISTICS**

The following sections describe each of the reports that are available in the Coverage Statistics report category. For each report, notes are included for the purpose, input criteria, and output formats.

### ***CLINIC IMMUNIZATION COUNT***

#### PURPOSE

- This report generates a list of the number of vaccinations administered by a clinic during a given period, by vaccine type.
- This report can almost suffice as an inventory report in that the number of vaccinations summarized on the report should directly correspond to the amount of vaccine administered.
- A summary of vaccines administered at all clinics requested is included at the end of the report.
- *Note: Only vaccinations administered by the clinic(s) included in the report are included in the summary counts.*

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- Funding Source – See notes on funding source in the General Information section above.
- Provider Category – See notes on provider category in the General Information section above. This is a permission-based criterion. Not all users will have access to this field.
- County – See notes on county in the General Information section above. This is a permission-based criterion. Not all users will have access to this field.
- Vaccination Date Range – See notes on vaccination date range in the General Information section above.

#### OUTPUT

- Output Format: PDF document
- Vaccination information including vaccination code (e.g. MMR or Tdap) and description, vaccination type (e.g. Adult, Child, Travel...), count of administered vaccines, total of all vaccines administered at the clinic.

### ***DAILY VACCINATIONS REPORT***

#### PURPOSE

- This report generates a list of the vaccinations administered from a specific provider's inventory location(s).

- The report sums up the vaccinations given by vaccine for each inventory location, date and funding source.
- This is based on inventory transactions and can be impacted by un-administered vaccinations.

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- Inventory Location – This is a list of inventory locations defined for the provider that the user is currently working with (as defined on the home screen).
- Vaccine – This is a list of active vaccines defined in Arkansas WebIZ.
- Funding Source – See notes on funding source in the General Information section above.
- Vaccination Date Range – See notes on vaccination date range in the General Information section above.

#### OUTPUT

- Output Format: PDF document or HTML – If the user does not need to print the report, an HTML screen format is available.
- Vaccine information including inventory location, vaccination, funding source, vaccination date, and doses administered.

### ***DOSAGE REPORT***

#### PURPOSE

- This report generates a list of the number of vaccinations given by dose number, vaccine, and patient age range that correspond to the report criteria.
- The dose numbers given to patients are broken down on the report as well.
- Deleted patients are not included in the results.
- A summary of vaccines administered at all clinics requested is included at the end of the report.
- *Note: Only vaccinations administered by the clinic(s) included in the report are included in the summary counts.*

#### INPUT CRITERIA

- Report Type
  - Specific Clinics – Breakdown vaccine dose usage by each clinic.
  - All Clinics – Only breakdown usage at a summary level. This is a permission-based criterion. Not all users will have access to this field.
  - Clinics by Group – Breakdown dosage by clinic, but at a vaccine group level instead of specific vaccine (i.e. DTaP vs. DTP, DTaP, TD...)

- All Clinics by Group – Only breakdown the usage at a summary or vaccine group level and not at each clinic. This is a permission-based criterion. Not all users will have access to this field.
- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- Provider Category – See notes on provider category in the General Information section above. This is a permission-based criterion. Not all users will have access to this field.
- County – See notes on county in the General Information section above. This is a permission-based criterion. Not all users will have access to this field.
- Vaccination Date Range – See notes on vaccination date range in the General Information section above.
- Funding Source – See notes on funding source in the General Information section above.

#### OUTPUT

- Output Format: PDF Document
- Vaccination information including vaccination code (e.g. MMR or Tdap) and description and dose number that was administered to the patient
- Age ranges when doses were administered include:
  - Less than 1, 1, 2, 3 – 5, 6, 7 – 10, 11 – 12, 13 – 18, 19 – 24, 25 – 44, 45 – 64, 65 and over, and Age Unknown
- The total number of vaccines of that dose is listed as well as the totals of doses given to each of the age groups.

### ***IMMUNIZATION RATES***

#### PURPOSE

- This report determines the percentage of patients that are current on their immunizations. Conversely, it can also determine the percentage of patients not current on their immunizations.
- Only patients who are active in the immunization program, during the vaccination period are included.
- The Recommender is run against all patients meeting the indicated criteria. This ensures that only valid vaccine doses are counted as meeting the vaccine series requirements.

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- Report Type:

- Appropriate Statistics Summary – This report is the statistical information for the number of patients meeting (or not meeting) the indicated vaccine series.
- Patients Not Properly Immunized Detail – This report is a listing of all of the patients who do not meet the indicated vaccine series.
- Doses By Vaccine Series – Select a predefined series or build your own series to be used for the immunization rates assessment.
- Age Range From/Through – Indicate the age range of the patients that should be included in the report.
- As of Date Range From/Through – Only patients within the indicated age range sometime in this date range are included in the report.
- Compliance By
  - Age – Perform additional calculations on the number of patients who satisfied the series by the indicated age.
  - Date – Perform additional calculations on the number of patients who satisfied the series by the indicated date.
  - Option to Exclude Patients with Less than 2 non-Influenza/H1N1 Vaccinations

#### OUTPUT

- Output Format: PDF document
- Appropriate Statistics Summary
  - Total number of patients analyzed for the report
  - Total number of patients that have been inactivated and are not included in this report.
  - Full Data Set
    - The number and percentage of patients having fully met the defined vaccination series.
    - The number and percentage of patients not having fully met the defined vaccination series.
    - The number and percentage of patients having met each of the individual vaccine groups in the defined series.
    - The number and percentage of patients not having met each of the individual vaccine groups in the defined series.
  - Compliance Criteria Subset
    - For each of the statistics in the Full Data Set, there is a similar set of statistics for the number of patients as assessed at the Compliance Age/Date.
- Patients not Properly Immunized Detail
  - Patient information including unique patient ID, name and DOB, include in reminder/recall indicator, last vaccination given, address, parent, phone, default clinic, county and local ID.

- Vaccination information including vaccination group, vaccination, dose, vaccination date, administering clinic and invalid dose
- Every patient counted as not having met the full series in the Appropriate Statistics report is listed.

### ***PATIENT COUNTS BY AGE AND INSURANCE SOURCE***

#### PURPOSE

- The purpose of this report is to generate a list of insurance sources with a count of the number of patients that received a vaccination during the indicated date range.

#### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on clinic in the General Information section above.
- Insurance Source - This is a list of all insurance providers available in the registry.
- Recommender Schedule - This is the list of all recommender schedules defined in the registry.
- Occupation - Lists all of the occupations available in the registry. Note that this is not used by most registries and should be left blank.
- Vaccination Date Range - See notes on vaccination date range in the General Information section above.

#### PROCESSING

- The purpose of the report is to provide a listing of patients by age group who received vaccinations for a particular insurance source during the period specified.
- The vaccinations counted during the period do not have to be given by the clinic and/or provider selected as criteria, just having had a vaccination during the date range indicated is sufficient.

#### OUTPUT

- Output Format: PDF document
- Insurance Source totals by different age range “buckets”.
- Total patient count and totals by age group.

### ***PATIENTS AGED OUT OF THEIR VFC ELIGIBILITY CODE***

#### PURPOSE

- Interactive report that allows the user to update eligibility for those patients in the registry that should not really be associated with an eligible VFC code. The system will automatically resolve this when the patient next receives services, but this may impact other reports or ad-hoc query results unintentionally.

#### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on clinic in the General Information section above.

#### PROCESSING

- The intent of the screen is to allow a user to set the VFC eligibility code of patients over their VFC eligibility age limit to one that is appropriate (i.e. NOT eligible code).
- The patients that are displayed must not have been deleted in the system. They can be inactive in programs, but must not have been deleted.
- Opted out patients are not included in the results.
- The patients that appear on this list obviously have to have a date of birth defined on the demographics screen.
- The patient's VFC code can be changed on the screen by selecting an appropriate code from the VFC drop down list

#### OUTPUT

- Output Format: PDF document
- Patient ID, Name, Date of Birth, Age, Gender and VFC eligibility
- VFC eligibility Code list that can be utilized to change the code for the associated patient.

### ***VACCINATIONS BY FUNDING SOURCE***

#### PURPOSE

- This report is similar to the dosage report, but can be limited by funding source.
- The purpose of the report is to count the vaccinations given to patients by age group during the requested period.
- The report does not count deleted patient vaccinations.
- If a funding source is not chosen for criteria, all funding sources are included together.
- *Note: The report counts vaccinations administered at the clinics represented in the criteria only.*

#### INPUT CRITERIA

- Report Type:
  - Specific Clinics – Shows vaccination totals by clinic. This only applies when you are not limited to choosing a specific clinic based on the user reporting level. Otherwise, the Specific Clinics and All Clinics reports are equivalent.
  - All Clinics – Shows vaccination totals for all clinics (permission-based).
- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- Funding Source – See notes on funding source in the General Information section above.
- County – See notes on county in the General Information section above.

- Vaccination Date Range – See notes on vaccination date range in the General Information section above.

#### OUTPUT

- Output Format: PDF document
- Vaccination code (vaccination type, e.g. MMR or Tdap) and description
- VFC eligibility
- Dose number that was administered to the patient
- Age ranges when doses were administered include:
  - Less than 1, 1, 2, 3 – 5, 6, 7 – 10, 11 – 12, 13 – 18, 19 – 24, 25 – 44, 45 – 64, 65 and over, and Age Unknown
- The total number of vaccines of that dose is listed as well as the total of doses given to each of the age groups.

### ***VFC CATEGORY PATIENT COUNT REPORT***

#### PURPOSE

- This report generates a list of the number of patients by VFC eligibility and age that were vaccinated during the period specified in the criteria.
- A patient can be counted more than once during the period of the report if they change VFC eligibility or age “buckets” during the range of the report.
- *Note: The VFC code used for reporting is captured at the time of vaccination and is not necessarily the current VFC code for the patient.*

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- Vaccination Date Range – See notes on vaccination date range in the General Information section above.

#### OUTPUT

- Output Format: PDF document
- Patients vaccinated by VFC category and age group. The VFC categories differ by registry, however, the age groups are as follows:
  - Less than 1, 1 – 6, 7 – 18, total of VFC Eligible 0-18 age range, percent of VFC Eligible 0-18 age range, 19 – 20, 21 and over and Age Unknown. The Age Unknown column should always be zero as dates of birth are required for all patients in CIIS.
- A corollary VFC Flu eligible report is also included after the main report. This is similar to the main report except that it counts patients who received a flu shot during the period and indicates what their VFC Flu vaccination classification was at that time.

## ***VFC ELIGIBLE PATIENTS OVER 18***

### **PURPOSE**

- The purpose of this report is to identify people who have aged out of the VFC program but haven't been updated on the Demographics screen.
- Interactive report that allows the user to act on those patients in Arkansas WebIZ that should not be associated with an eligible VFC code. The system will automatically resolve this when the patient next receives services, but this may impact other reports or ad-hoc query results unintentionally.
- The intent of the screen is to allow a user to set the VFC eligibility code of patients over 18 to one that is appropriate (e.g. NOT eligible code).
- The patients that are displayed must not have been deleted in the system. They can be inactive in programs, but must not have been deleted.
- The patient's VFC code can be changed on the screen by selecting an appropriate code from the VFC drop down list.

### **INPUT CRITERIA**

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.

### **OUTPUT**

- Output Format: PDF document
- Patient information including patient name, age, DOB, gender and VFC eligibility
- VFC eligibility Code list that can be utilized to change the code for the associated patient.

## ***VFC VACCINATION HISTORY***

### **PURPOSE**

- This report generates a list of VFC eligible patients that received non-VFC funded vaccinations or vice versa. The purpose of the report is to indicate patients who are VFC eligible and did not receive VFC vaccine when the Patient VFC Eligibility criterion is selected as "Eligible". Conversely, a list of patients who are not VFC eligible, but received VFC funded vaccine.
- This report only applies to VFC providers.

### **INPUT CRITERIA**

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- Vaccination Date Range – See notes on vaccination date range in the General Information section above.
- Patient VFC Eligibility:

- Eligible – Patients who are eligible for VFC vaccinations.
- Not Eligible – Patients who are not eligible for VFC vaccinations.

#### OUTPUT

- Output Format: PDF document
- Patient information including patient name, unique patient ID in parentheses and DOB.
- Vaccination information including vaccine, dose, funding source, vaccination date, administering clinic, and person administering vaccination.
- *Note: The report output is the same for either version of the report.*

### **DATA QUALITY - USER**

The following sections describe each of the reports that are available in the Data Quality – User report category. For each report, notes are included for the purpose, input criteria, and output formats.

#### ***PATIENTS WITH POSSIBLE DUPLICATE VACCINATIONS***

##### PURPOSE

- Generates a list of patients that have multiple vaccinations within the specified number of days within the same vaccine group.

##### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on clinic in the General Information section above.
- Status - Optional field to restrict the results to only Active (i.e., patient is open in the IZ program) or Inactive (i.e., patient is closed out of the IZ program) patients
- Number of Days (Plus or Minus) From Vaccination Date to Detect Possible Duplicate - Vaccinations belonging to the same vaccine series within +/- this number of days of each other will be included in the results.
- Vaccine Series - Optional field to restrict the results to specific vaccines. If not selected then all vaccines will be included.
- Vaccination Date Range - See notes on vaccination date range in the General Information section above.

##### PROCESSING

- The intent of the report is to generate a list of any patients who have vaccinations within the same vaccine series that are within the specified number of days of each other. These vaccinations are likely to be duplicates and should be researched and the record updated accordingly.

- Vaccines within the Travel and Other vaccination series are excluded from this report.
- Deleted patients are not included in the results.
- Opted out patients are not included in the results.
- Note: When using the Vaccination Date Range filter both potential duplicate vaccinations must fall within the date range specified. Otherwise leave blank to pull all vaccinations.

### **OUTPUT**

- Output Format: PDF document
- Patient Last Name, First Name, ID, DOB, Vaccine Series, and potential duplicate vaccinations with dates.

### **POSSIBLE PATIENT DUPLICATES**

#### PURPOSE

- This report generates a list of the possible patient duplicates found by the nightly job.
- The system routinely runs a process that looks for potential duplicate patient records in the system by comparing the name, DOB, and other information of each record to every other record in the system. The results are stored in the database for future review by key users.
- The results of this process are available to administrative users.
- The intent of this report is to allow users to see a subset of the results where one or both patients identified in the possible match belong to the indicated Provider and Clinic.
- Deleted patients are not included in the results.

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- Duplicate Found Date Range – Optional date range to restrict the result to only those found during the indicated timeframe.

#### OUTPUT

- Output Format: PDF document
- A variety of information such as name, DOB, address, etc. about the source patient and possible duplicate patient listed side-by-side for easy review/comparison.

### **SHOTS BEFORE BIRTH**

#### PURPOSE

- This report generates a list of patients who have at least one vaccination that was given before the patient's date of birth.
- This can be used to correct bad data (either date of birth or vaccination service data).

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.

#### OUTPUT

- Output Format: PDF document
- Patient information including unique patient ID, name, and DOB.
- Vaccine information including administering clinic, vaccine, and vaccination date.

### ***USER VACCINATION DETAILS***

#### PURPOSE

- This report generates a list of any vaccinations that meet the indicated criteria. This can be helpful when trying to identify vaccinations that may need to be reviewed/updated for a variety of reasons.
- Deleted patients are not included in the results.

#### INPUT CRITERIA

- Vaccine – A list of the active vaccinations in the system
- Provider – Selecting a provider here will restrict the list of users in the Created By and Updated By lists to only those users associated with this provider.
- Clinic – Selecting a clinic here will restrict the list of users in the Created By and Updated By lists to only those users associated with this clinic.
- Vaccination Date Range – See notes on vaccination date range in the General Information section above.
- Audit Create Date Range – Includes all users who created a record in the selected date range (matching other selected criteria).
- Audit Update Date Range – Includes all users who updated the record in the selected date range (matching other selected criteria).
- Vaccinations:
  - All – Include all vaccinations in the results set.
  - Historical – Include only vaccinations added as historical in the results set.
  - Invalid – Include only vaccinations that have been manually marked as invalid in the results set.
- Vaccinations Created By or Updated By – Optionally restrict the results to only those vaccinations that were created by and/or updated by the selected users.

#### OUTPUT

- Output Format: PDF document or Extract file (e.g. text file or Excel). To save the report as an Excel file, use a comma as your delimiter. To save the report as a text file, use a pipe as the delimiter.

- Patient information including name, unique patient ID in parentheses, DOB, and default clinic
- Vaccination information including vaccination date, administering clinic, vaccination type, lot number, funding source, historical indicator, invalid indicator, user who created the record, and user who last updated the record

### **VACCINATIONS ADDED BUT NOT ADMINISTERED**

#### PURPOSE

- This report generates a list of patients with vaccinations that have been added but not administered. The report lists the vaccination services that have been indicated as having been intended as being administered to a patient, but not finalized by a user indicating the manufacturer, lot number, expiration date, and service provider for the vaccine.
- This report is important to run on a periodic basis as it can directly impact the validity of other reports and the inventory reconciliation process.
- *Note: If the County is used, it indicates the county of the administering clinic and not the county of residence of the patient.*

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- County – See notes on county in the General Information section above.
- Vaccination Date Range – See notes on vaccination date range in the General Information section above.

#### OUTPUT

- Output Format: PDF document
- Patient information including name, unique patient ID in parentheses, and DOB.
- Vaccination information including vaccination, dose, administering clinic, date administered, and age at vaccination.

## **VACCINE ORDER MANAGEMENT**

### ***VACCINE SHIPMENT***

#### PURPOSE

- Generates a list of vaccine shipments imported into WebIZ and the status per line item.

#### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on Clinic in the General Information section above.
- Line Item Status - Use this field to optionally filter the results by the status of the order. (i.e. pending, dismissed, received).
- Vaccine Order Date Range - Use this field to optionally filter the results by the date of the vaccine order.
- Shipped Date Range. - Use this field to optionally filter the results by the date the vaccine was shipped from McKesson.

#### OUTPUT TYPE

- PDF
- Extract

#### PROCESSING

- The system will find any vaccine shipments that meet the search criteria

#### OUTPUT

- Provider/Clinic, Order ID, Order Date, Vaccine Shipment information, and status of line item.

### ***VACCINE ORDER STATUS***

#### PURPOSE

- Generates the status of vaccine orders in the system.

#### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on clinic in the General Information section above.
- Order Status - Use this field to optionally filter the results by the status of the order (i.e. rejected, approved, etc).
- Order Type - Use this field to optionally filter the results by the type of the order (i.e. influenza, priority, etc).

- Vaccine Order Date Range - Use this field to narrow down the search results by the date the order was placed.
- Submitted to VTrckS Date Range - Use this field to narrow down the search results by the date the order was submitted to VTrckS.

#### OUTPUT TYPE

- PDF
- Extract

#### PROCESSING

- The system will find any vaccine orders that meet the search criteria.

#### OUTPUT

- Prov/Clinic, Order No., Order Date, Order Status, Date Submitted to VTrckS, Influenza Ind, Priority Reason, Unavailable Vaccines, Total Doses, Cost.

## **VFC PROGRAM MANAGEMENT**

### ***TEMP LOG AGING***

- This report will generate a listing of all Clinics that have a VFC/VTrckS PIN and when they last submitted an approved temperature log.

#### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on clinic in the General Information section above.
- VTrckS Status - Use this option to narrow down the results by the VTrckS Status for the clinic.
- Temp Log Aging Date Range - Restrict the list of results to only those clinics with a temp log approved date within the specified date range.

#### OUTPUT TYPE

- PDF
- Extract

#### PROCESSING

- The system will identify any clinic with a VFC/VTrckS PIN and display them by date of most recent temp log approval then by provider and clinic.

#### OUTPUT

- Provider, Clinic, Shipping Contact details, and information for each clinic on the temp log information.

#### ***VFC/VTRCKS SITE ORDER CONFIGURATION***

- Generates a summary of all the vaccine order settings for a provider/clinic.

#### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on clinic in the General Information section above.
- County - See notes on county in the General Information section above.
- VTrckS Status - Use this field to optionally filter the search results by the VTrckS Status (i.e. on contract, not on contract, etc.).
- Clinic Type of Practice - Use this field to optionally filter the search results by the type of practice per clinic.
- Include Inactive Providers/Clinics indicator - Check this box to include inactive provider and clinics.

#### OUTPUT TYPE

- PDF
- Extract

#### PROCESSING

- The system will indicate any vaccine order settings for the clinics that match the indicated search results.

#### OUTPUT

- Prov/Clinic, VFC/VTrckS PIN, Renewal Cert Date, Vaccine order settings, VTrckS Status.

#### ***VFC/VTRCKS SITE SHIPPING CONFIGURATION***

- Generates a summary of all the shipping information for a provider/clinic.

#### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on clinic in the General Information section above.
- VTrckS Status - Use this field to optionally filter the search results by the VTrckS Status (i.e. on contract, not on contract, etc.).
- Clinic Type of Practice - Use this field to optionally filter the search results by the type of practice per clinic.
- Include Inactive Providers/Clinics indicator - Check this box to include inactive provider and clinics.

#### OUTPUT TYPE

- PDF
- Extract

#### PROCESSING

- The system will indicate any shipping information for the clinics that match the indicated search results.

#### OUTPUT

- Prov/Clinic, VFC/VTrckS PIN, Shipping information (i.e. contact, address, hrs, special instructions).

## **INVENTORY MANAGEMENT – VACCINE**

The following sections describe each of the reports that are available in the Vaccine Inventory Management report category. For each report, notes are included for the purpose, input criteria, and output formats.

**The reports in the inventory section only apply to providers that are utilizing the Inventory Module.**

### ***INVENTORY ADJUSTMENT INQUIRY***

#### PURPOSE

- This report generates a list of inventory transactions for a provider's inventory of type ADJ (Adjustment) only.
- The report lists individual inventory adjustment transactions corresponding to the input criteria.

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Inventory Location – This is a list of inventory locations defined for the provider that the user is currently working with (as defined on the home screen).
- Vaccine – This is a list of active vaccines defined in the registry.
- Funding Source – See notes on funding source in the General Information section above.
- Manufacturer – This is a list of all manufacturers defined in Arkansas WebIZ.
- Lot Number – This is a list of all lot numbers that have been defined in Arkansas WebIZ. Note: This can be confusing in that lot numbers listed here may have been used by inventory locations other than the inventory location chosen, so take care when using inventory location criteria.

- Batch Name – This field was used to track smallpox vaccine and is no longer in use.
- Reason For Adjustment – This is a list of inventory adjustment reason codes defined in the registry.
- Expiration Date Range – This would be a date range of expiring inventory.
- Transaction Date Range – This is a range of inventory transaction dates.

#### OUTPUT

- Output Format:
  - PDF document or Extract file (e.g. text file or Excel). To save the report as an Excel file, use a comma as your delimiter. To save the report as a text file, use a pipe as the delimiter.
  - HTML – If the user does not need to print the report, an HTML screen format is available. The user does have access to view additional information from the screen that is not available in the PDF report.
- Inventory information including inventory transaction ID, inventory locations, transaction date, vaccine, manufacturer, NDC number, lot number, funding source, expiration date, transaction type, number of doses, user responsible for generating the inventory transaction (created by), reason for adjustment and comments.

### ***INVENTORY ON-HAND***

#### PURPOSE

- This report generates a list of non-expired, non-depleted inventory on-hand corresponding to the input criteria.

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Inventory Location – This is a list of inventory locations defined for the provider.
- Vaccine – This is a list of active vaccines defined in the registry.
- NDC Number – National Drug Code number that uniquely identifies the vaccine product
- Funding Source – See notes on funding source in the General Information section above.
- Manufacturer – This is a list of all manufacturers defined in the registry.
- Lot Number – This is a list of all lot numbers that have been defined in Arkansas WebIZ. Note: This can be confusing in that lot numbers listed here may have been used by inventory locations other than the inventory location chosen, so take care when using inventory location criteria.
- Batch Name – This field was used to track smallpox vaccine and is no longer in use.
- Expiration Date Range – This would be a date range of expiring inventory.

## OUTPUT

- Output Format: PDF document or Extract file (e.g. text file or Excel). To save the report as an Excel file, use a comma as your delimiter. To save the report as a text file, use a pipe as the delimiter.
- Inventory information including vaccine, manufacturer, NDC number, lot number, funding source, expiration date, and number of doses currently on-hand.

## ***INVENTORY PENDING TRANSFERS***

### PURPOSE

- This report generates a list of individual inventory transfer transactions corresponding to the input criteria that have not been received.

### INPUT CRITERIA

- Source Provider – This is the provider where the inventory originates.
- Source Inventory Location – This is a list of inventory locations defined for the Source Provider.
- Destination Inventory Location – This is a list of all other inventory locations in the system where inventory can be transferred to.
- Vaccine – This is a list of active vaccines defined in Arkansas WebIZ.
- Funding Source – See notes on funding source in the General Information section above.
- Manufacturer – This is a list of all manufacturers defined in the registry.
- Lot Number – This is a list of all lot numbers that have been defined in Arkansas WebIZ. Note: This can be confusing in that lot numbers listed here may have been used by inventory locations other than the inventory location chosen, so take care when using inventory location criteria.
- Batch Name – This field was used to track smallpox vaccine and is no longer in use.
- Transaction Date Range – This is a range of inventory transaction dates.

### OUTPUT

- Output Format: PDF document
- Inventory information including inventory transaction ID, to and from inventory locations, transaction date, vaccine, manufacturer, NDC number, lot number, funding source, expiration date, number of doses, person authorizing the transfer the Source Inventory Location (from location authorizer), comments, and user responsible for generating the inventory transaction (created by).

## ***INVENTORY SUMMARY BY FUNDING SOURCE***

### **PURPOSE**

- This report generates a list of all inventory items by funding source for the provider and inventory location identified.
- This report lists beginning inventory, inventory amounts for various transactions (e.g. vaccine transfers, vaccine adjustments) and ending inventory.
- This report is similar to the MIR, but utilizes different search/filter criteria and displays summaries for all funding sources.
- *Note: This report is used to reconcile inventory denoted in Arkansas WebIZ with actual inventory on-hand in the provider's office.*

### **INPUT CRITERIA**

- Provider – See notes on provider in the General Information section above.
- Inventory Location – This is a list of inventory locations defined for the provider.
- Begin Date Range – This is a beginning range of inventory transaction dates. This will restrict the inventory displayed in the report to inventory that had transactions starting during this timeframe.
- End Date Range – This is an ending range of inventory transaction dates. This will restrict the inventory displayed in the report to inventory that had transactions ending during this timeframe.
- Sort by:
  - Audit Date (descending) – This will sort results by the beginning date of the audit.
  - Inventory Location, Begin Date (descending) – This will sort results by the inventory location first and then the beginning date of the audit.

### **OUTPUT**

- Output Format: PDF document
- Inventory information includes: description, begin and end dates, user who authorized report (authorized by), practice/facility information, vaccine, beginning inventory, vaccine doses received, vaccine doses administered, vaccine doses transferred, vaccine recalled, vaccine doses expired or wasted, vaccine unaccounted for, ending discrepancies (long/short), and ending inventory.

## ***INVENTORY TRANSACTION INQUIRY***

### **PURPOSE**

- This report generates a list of individual inventory transfer transactions for a provider's inventory of any type corresponding to the input criteria.

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Inventory Location – This is a list of inventory locations defined for the provider.
- Vaccine – This is a list of active vaccines defined in the registry.
- Funding Source – See notes on funding source in the General Information section above.
- Manufacturer – This is a list of all manufacturers defined in the registry.
- Lot Number – This is a list of all lot numbers that have been defined in Arkansas WebIZ. Note: This can be confusing in that lot numbers listed here may have been used by inventory locations other than the inventory location chosen, so take care when using inventory location criteria.
- Batch Name – This field was used to track smallpox vaccine and is no longer in use.
- Expiration Date Range – This is a date range of expiring inventory.
- Transaction Date Range – This is a range of inventory transaction dates.

#### OUTPUT

- Output Format:
  - PDF document or Extract file (e.g. text file or Excel). To save the report as an Excel file, use a comma as your delimiter. To save the report as a text file, use a pipe as the delimiter.
  - HTML – If the user does not need to print the report, an HTML screen format is available. The user does have access to view additional information from the screen that is not available in the PDF report.
- Inventory information including inventory transaction ID, source and destination inventory location (only applies to transfers), transaction date, vaccine, manufacturer, NDC number, lot number, funding source, expiration date, transaction type, number of doses, adjustment reason, user responsible for generating the inventory transaction (created by), user responsible for updating the inventory transaction (updated by), person authorizing the from transfer (authorized by) and comments.

### ***INVENTORY TRANSFER INQUIRY***

#### PURPOSE

- This report generates a list of individual inventory transactions for a provider's inventory of type TFR (Transfer) only corresponding to the input criteria. This includes initial inventory, adjustments, vaccinations and transfers.

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Source Inventory Location – This is a list of inventory locations defined for the Source Provider.

- Destination Inventory Location – This is a list of all other inventory locations in the system.
- Inventory Location – This is a list of inventory locations defined for the provider that the user is currently working with (as defined on the home screen).
- Vaccine – This is a list of active vaccines defined in the registry.
- Funding Source – See notes on funding source in the General Information section above.
- Manufacturer – This is a list of all manufacturers defined in the registry.
- Lot Number – This is a list of all lot numbers that have been defined to the registry. *Note: This can be confusing in that lot numbers listed here may have been used by inventory locations other than the inventory location chosen, so take care when using this criterion.*
- Batch Name – This field was used to track smallpox vaccine and is no longer in use.
- Expiration Date Range – This would be a date range of expiring inventory.
- Transaction Date Range – This is a range of inventory transaction dates.

#### OUTPUT

- Output Format:
  - PDF document or Extract file (e.g. text file or Excel). To save the report as an Excel file, use a comma as your delimiter. To save the report as a text file, use a pipe as the delimiter.
  - HTML – If the user does not need to print the report, an HTML screen format is available. The user does have access to view additional information from the screen that is not available in the PDF report.
- Inventory information including inventory transaction ID, to and from inventory locations, transaction date, vaccine, manufacturer, NDC number, lot number, funding source, expiration date, number of doses, user responsible for authorizing the transaction (authorized by), user responsible for generating the inventory transaction (created by) and comments.

### **MONTHLY IMMUNIZATION REPORT (VFC AND OTHER PUBLIC-FUNDED)**

#### PURPOSE

- Generate a Monthly Immunization Report (MIR) for any closed inventory reconciliation (or a summary across all of a provider’s locations with the same Begin/End date).
- The report lists inventory reconciliation information that was created as part of the inventory reconciliation process.

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.

- Inventory Location – This is a list of inventory locations defined for the provider that the user is currently working with (as defined on the home screen).
- The user will be displayed a screen containing the inventory reconciliations for the provider listed on the home screen. If the user has access to multiple providers, then the user will need to select the appropriate provider. The user can choose a reconciliation period to report on.
- *Note: Many of the criteria used to create the reconciliation are displayed on the screen to help differentiate between different reconciliations.*

#### OUTPUT

- Output Format: PDF document
- Inventory information including description, begin and end dates, user who authorized report (authorized by), practice/facility information, vaccine, beginning inventory, vaccine doses received, vaccine doses administered, vaccine doses transferred, vaccine recalled, vaccine doses expired or wasted, vaccine unaccounted for, ending discrepancies (long/short), and ending inventory.

### ***POSSIBLE DUPLICATE INVENTORY REPORT***

#### PURPOSE

- This report generates a list of possible duplicate inventory based on selected criteria.

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Inventory Location – This is a list of inventory locations defined for the provider.
- Vaccine – This is a list of active vaccines defined in the registry.
- Funding Source – See notes on funding source in the General Information section above.
- Manufacturer – This is a list of all manufacturers defined in the registry.
- Lot Number – This is a list of all lot numbers that have been defined to the registry.  
*Note: This can be confusing in that lot numbers listed here may have been used by inventory locations other than the inventory location chosen, so take care when using inventory location criteria.*
- Expiration Date Range – This would be a date range of expiring inventory.
- Option to exclude depleted line items

#### OUTPUT

- Output Format: PDF document or Extract file (e.g. text file or Excel). To save the report as an Excel file, use a comma as your delimiter. To save the report as a text file, use a pipe as the delimiter.

- Inventory information including default provider, inventory location, possible duplicate vaccines, manufacturer, NDC number, lot number, funding source, and expiration date.

## **INVENTORY MANAGEMENT – MEDICATIONS, PPE, AND OTHER**

### ***NON-VACCINE INVENTORY ADJUSTMENT INQUIRY***

- Generate a list of inventory transactions for a provider's inventory of type ADJ (Adjustment) only.

#### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Inventory Location - This is a list of inventory locations defined for the provider that the user is currently working with (as defined on the home screen).
- Inventory Type - This is a list of active inventory types defined in the registry.
- Funding Source - This is a list of funding sources available in the registry.
- Manufacturer - This is a list of all manufacturers defined in the registry.
- Lot/Serial - This is a list of all lot/serial numbers that have been defined to the registry. Note that this can be confusing in that lot/serial numbers listed here may have been used by inventory locations other than the inventory location chosen, so take care when using inventory location criteria.
- NDC # - This is a free text box to indicate a specific NDC #.
- Reason For Adjustment - This is a list of inventory adjustment reason codes defined in the registry.
- Expiration Date Range - This would be a date range of expiring inventory.
- Transaction Date Range - This is a range of inventory transaction dates.

#### OUTPUT TYPE

- PDF - If the user intends on printing the report, it is best to use PDF for output. This is the preferred and default format.
- Extract File - Generates a character-delimited file (using the indicated Delimiter) that can be imported into other applications for further manipulation and analysis (e.g., Excel).

#### PROCESSING

- The report lists individual inventory adjustment transactions corresponding to the input criteria.

## OUTPUT

- Inventory Transaction ID, Inventory Locations, Transaction Date, Inventory Type, Manufacturer, Lot Number, NDC#, Funding Source, Expiration Date, Type, Quantity (Qty), Adjustment Reason, UOM, Comments and User responsible for generating the inventory transaction.
- Totals by Adjustment Reason Types.

## ***NON-VACCINE INVENTORY ON-HAND***

- Generate a list of inventory on-hand in the system.

## INPUT CRITERIA

- Display as Summary by Item Inventory Type or Details by Inventory Location.
- Provider - See notes on provider in the General Information section above.
- Inventory Location - This is a list of inventory locations defined for the provider.
- Medication - This is a list of active medication defined in the registry.
- Funding Source - This is a list of funding sources available in the registry.
- Manufacturer - This is a list of all manufacturers defined in the registry.
- Lot/Serial - This is a list of all lot/serial numbers that have been defined to the registry. Note that this can be confusing in that lot/serial numbers listed here may have been used by inventory locations other than the inventory location chosen, so take care when using inventory location criteria.
- NDC # - This is a free text box to indicate a specific NDC#.
- Expiration Date Range - This would be a date range of expiring inventory.

## OUTPUT TYPE

- Output Format: PDF. If the user intends on printing the report, it is best to use PDF for output. This is the preferred and default format.
- Extract File. Generates a character-delimited file (using the indicated Delimiter) that can be imported into other applications for further manipulation and analysis (e.g., Excel).

## PROCESSING

- The report lists the non-expired, non-depleted inventory on-hand corresponding to the input criteria.

## OUTPUT

- Medication, Manufacturer, Lot Number, NDC #, Funding Source, Expiration Date, UOM, and Qty currently On-Hand
- Total Quantity by Inventory Locations and by Providers.

## ***NON-VACCINE INVENTORY TRANSACTION INQUIRY***

- The Inventory Inquiry can be used to find or validate inventory transactions of any type that have been made in the system. This becomes useful in the process of inventory reconciliation or resolving problematic inventory items.
- Navigate to the Countermeasure Inventory Inquiry screen by selecting the Inventory item in the Main menu. From there, select the Medications, PPE, or Other menu item and then the Inquiry option. Generate a list of inventory transactions for a provider's inventory of any type.

### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Inventory Location - This is a list of inventory locations defined for the provider that the user is currently working with (as defined on the home screen).
- Inventory Type - This is a list of active inventory type defined in the registry.
- Funding Source - This is a list of funding sources available in the registry.
- Manufacturer - This is a list of all manufacturers defined in the registry.
- Lot/Serial - This is a list of all lot/serial numbers that have been defined to the registry. Note that this can be confusing in that lot/serial numbers listed here may have been used by inventory locations other than the inventory location chosen, so take care when using inventory location criteria.
- NDC # - This is a free text box to indicate a specific NDC #.
- Shipment ID - This is a free text box to indicate a specific Shipment ID.
- Expiration Date (From and Through) - This would be a date range of expiring inventory.
- Transaction Date (From and Through) - This is a range of inventory transaction dates.

### OUTPUT TYPE

- HTML - If the user does not need to print the report, an HTML screen format is available. The user does have access to view additional information from the screen that is not available in the PDF report.
- PDF. If the user intends on printing the report, it is best to use PDF for output. This is the preferred and default format.
- Extract File. Generates a character-delimited file (using the indicated Delimiter) that can be imported into other applications for further manipulation and analysis (e.g., Excel).

### PROCESSING

- The report lists individual inventory transactions corresponding to the input criteria. This includes, initial inventory, adjustments, vaccinations and transfers.

## OUTPUT

- Inventory Transaction ID, Src (source) and Dest (destination) Inventory Locations (only applies to transfers), Transaction Date, Inventory Type, Manufacturer, Lot Number, NDC #, Funding Source, Expiration Date, Transaction Type, Qty of Doses, Adjustment Reason, UOM, Person Authorizing the From Transfer, Comments and User responsible for creating and last updating the inventory transaction.
- Totals by Adjustment Types.

## ***NON-VACCINE INVENTORY TRANSFER INQUIRY***

- Generate a list of inventory transactions for a provider's inventory of type TFR (Transfer) only.

## INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Source Inventory Location - This is a list of inventory locations defined for the Source Provider.
- Destination Inventory Location - This is a list of all other inventory locations in the system.
- Inventory Type - This is a list of active inventory type defined in the registry.
- Funding Source - This is a list of funding sources available in the registry.
- Manufacturer - This is a list of all manufacturers defined in the registry.
- Lot/Serial Number - This is a list of all lot/serial numbers that have been defined to the registry. Note that this can be confusing in that lot/serial numbers listed here may have been used by inventory locations other than the inventory location chosen, so take care when using inventory location criteria.
- NDC # - This is a free text box to indicate a specific NDC #.
- Shipment ID - This is a free text box to indicate a specific Shipment ID.
- Expiration Date Range - This would be a date range of expiring inventory.
- Transaction Date Range - This is a range of inventory transaction dates.

## OUTPUT TYPE

- PDF. If the user intends on printing the report, it is best to use PDF for output. This is the preferred and default format.
- Extract File. Generates a character-delimited file (using the indicated Delimiter) that can be imported into other applications for further manipulation and analysis (e.g., Excel).

## PROCESSING

- The report lists individual inventory transfers corresponding to the input criteria.

## OUTPUT

- Inventory Transaction ID, Src and Dest Inventory Locations, Transaction Date, Inventory Type, Manufacturer, Lot Number, NDC #, Funding Source, Expiration Date, Qty, UOM, Person that authorized transfer, Comments and User responsible for generating the inventory transaction.

## **CoCASA**

The following sections describe the reports that are available in the CoCASA report category. For each report, notes are included for the purpose, input criteria, and output formats.

### ***EXPORT DATA FOR CoCASA***

#### PURPOSE

- This report generates a list of patients and services for CoCASA data analysis based on selected criteria.

#### INPUT CRITERIA

- Provider – See notes on provider in the General Information section above.
- Clinic – See notes on clinic in the General Information section above.
- Age Range From/Through – Indicate the age range of the patients that should be included in the report.
- Common Review Date – This is the date the export was generated. It is the date the ages will be calculated. This allows users to use past dates or future dates.
- Insurance Source – This is a list of all insurance providers available in the registry.
- VFC Eligibility:
  - Yes – Patients who are eligible for VFC vaccinations
  - No – Patients who are not eligible for VFC vaccinations
- User can also select to exclude inactive or MOGE patients.

#### OUTPUT

- Output Format: Extract file as Text document that can be uploaded into the CoCASA database for analysis.

## **CAMPAIGNS**

### ***CRA TREATMENT REPORT***

- Generates counts of patients receiving each type of countermeasure by Provider/Clinic and by age group.

#### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on clinic in the General Information section above.
- Campaign - Only patients that received treatments in this campaign will be returned.
- Treatment Date Range - Only patients that received treatments within this date range are included in the report.
- Available Countermeasures - Only the countermeasures listed here are available as search criteria for this provider/clinic.
- Selected Countermeasures - Countermeasures selected for report. This will restrict the report to only return patients that received these selected countermeasures within the treatment date range specified.

#### OUTPUT TYPE

- PDF - If the user intends on printing the report, it is best to use PDF for output. This is the preferred and default format.
- Extract File - Generates a character-delimited file (using the indicated Delimiter) that can be imported into other applications for further manipulation and analysis (e.g., Excel).

#### PROCESSING

- The report lists the number of CRA treatments administered that correspond to the report criteria.
- Opted out patients are not included in the results.
- Deleted patients are not included in the results.

#### OUTPUT

- The report gives aggregate totals by provider/clinic and then by countermeasure and age groups and then age group totals by provider/clinic and total report.

### ***PATIENT TREATMENT DETAILED REPORT***

- Generates a list of every patient (and the treatment(s) they have received) grouped by Provider/Clinic.

#### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on clinic in the General Information section above.
- Campaign - Only patients that received treatments in this campaign will be returned.

- Treatment Date Range - Only patients that received treatments within this date range are included in the report.
- DOB Date Range - Restrict the list of patients to only those patients whose date of birth is within these parameters as of the date the report is generated.
- Available Countermeasures - Only the countermeasures listed here are available as search criteria for this provider/clinic.
- Selected Countermeasures - Countermeasures selected for report. This will restrict the report to only return patients that received these selected countermeasures within the treatment date range specified.
- Responder Type - Allows a user to restrict results to a specific responder type.
- Priority - Allows the specification of a priority for specific vaccinations. For example, a health-care worker may have a higher priority to receive a vaccination.

#### OUTPUT TYPE

- PDF - If the user intends on printing the report, it is best to use PDF for output. This is the preferred and default format.
- Extract File - Generates a character-delimited file (using the indicated Delimiter) that can be imported into other applications for further manipulation and analysis (e.g., Excel).

#### PROCESSING

- The report gives a list of patients that meet the search criteria.
- Opted out patients are not included in the results.
- Deleted patients are not included in the results.

#### OUTPUT

- The report output gives a list of patients that met criteria with their id, name, DOB, response type, priority, date of treatment, type of treatment, lot number, and then grand totals.

### ***PATIENT TREATMENT STATISTICAL REPORT***

- Generate counts of patients receiving each type of countermeasure by Provider/Clinic along with totals across all providers/clinics.

#### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on clinic in the General Information section above.
- Campaign - Only patients that received treatments in this campaign will be returned.
- Treatment Date Range - Only patients that received treatments within this date range are included in the report.
- DOB Date Range - Restrict the list of patients to only those patients whose date of birth is within these parameters as of the date the report is generated.

- Available Countermeasures - Only the countermeasures listed here are available as search criteria for this provider/clinic.
- Selected Countermeasures - Countermeasures selected for report. This will restrict the report to only return patients that received these selected countermeasures within the treatment date range specified.
- Responder Type - Allows a user to restrict results to a specific responder type.
- Priority - Allows the specification of a priority for specific vaccinations. For example, a health-care worker may have a higher priority to receive a vaccination.

#### PROCESSING

- The report gives totals per provider/clinic per type of treatment that met the search criteria.
- Opted out patients are not included in the results.
- Deleted patients are not included in the results.

#### OUTPUT

- Total counts by countermeasure type by provider/clinic then report totals from specified search criteria.

### ***RESPONDER REPORT***

- Generate list of responders associated with a provider/clinic optionally filtered by treatment received.

#### INPUT CRITERIA

- Treatment Date Range - Only patients that received treatments within this date range are included in the report.
- Responder Type - Allows a user to restrict results to a specific responder type.
- Priority - Allows the specification of a priority for specific vaccinations. For example, a health-care worker may have a higher priority to receive a vaccination.
- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on clinic in the General Information section above.
- County - Restricts results by patient's county of residence.
- City - Restricts results by patient's city of residence.

#### OUTPUT TYPE

- PDF - If the user intends on printing the report, it is best to use PDF for output. This is the preferred and default format.
- Extract File - Generates a character-delimited file (using the indicated Delimiter) that can be imported into other applications for further manipulation and analysis (e.g., Excel).

#### PROCESSING

- The report gives a list of patients that are documented as a responder, along with contact details.
- Opted out patients are not included in the results.
- Deleted patients are not included in the results.

#### OUTPUT

- Report list patients by provider/clinic with patient id, name, responder type, priority, address, and phone number for every patient in the system that met the search criteria.

## **COUNTY/ZIP**

### ***PATIENT BIRTHS (COUNTY/ZIP CODE LEVEL)***

- Generates a report of all patients born within the specified date of birth range and county/zip code.

#### INPUT CRITERIA

- County/Zip Code
- Note: A user will only see counties/zip codes to the address of the provider/clinics they are associated to. Users can only select county OR zip code in this report at one time.
- County - Patients with an address in this county will be selected.
- Zip Code - Patients with an address in this zip code will be selected.
- Date of Birth Range - Restrict the list of patients to only those patients whose date of birth is within these parameters as of the date the report is generated. Use the UOM field to indicate the Unit of Measure (e.g., Month or Year) used to interpret the Age Range values.

#### OUTPUT TYPE

- PDF
- Extract File

#### PROCESSING

- The report gives a list of patients that meet the criteria specified.

#### OUTPUT

- Patient Name, Patient ID, Patient DOB, Address (including county), Date of most recent vaccinations, Clinic of most recent vaccinations, and Mother and Father names.

## **HEDIS REPORT**

### ***HEDIS***

- The Healthcare Effectiveness Data and Information Set (HEDIS) is a collection of standardized performance measures for managed care organizations. HEDIS was developed and is maintained by the National Committee for Quality Assurance (NCQA). Consumers can use HEDIS data to compare the performance of health plans with each other and to national or regional benchmarks. Many of the measures focus on preventative care including immunization rates of insured patients.
- Insurance companies are aware of the immunizations that have been submitted for payment as part of a claim. However, for many members, the claims data for a particular insurance plan or company may only be a partial snapshot of the member's full immunization history. Immunization Information Systems (IIS) contain vaccinations for patients from a wide variety of data sources. It is a logical source of immunization data to help compliment an insurance plan's existing data.
- The goal of the HEDIS Query Interface is to provide a standardized, automated mechanism for insurance companies to request data as well as the IIS respond with the matching data set. Insurance companies will be given access to load their own data query files and then be able to pull down the results on their own through these screens.

### ***VIEW HEDIS QUERIES***

- You can enter values in any of the search fields to find any previously loaded files and their import status. A user will only be able to view/add/edit the files for the provider/clinic they are associated to.
- Navigate to the view screen by clicking the 'HEDIS' report category. The HEDIS Queries search screen is displayed. Fill in the search criteria and press "Search" or press "Cancel" to return to the previous screen.

### ***BUTTONS AND NAVIGATION***

- Search. Enter your search criteria first and then click this button to invoke the search.
- Cancel. Cancel takes you back to the previous screen.
- Add Incoming Batch Messages. Press this button to upload a new query file into the system.

### ***FIELDS AND ICONS***

- Owing Provider. This list represents the list of providers that the user currently has access to. This is determined by the user's "reporting level" indicated on the user security screen. For users who have access to "UNRESTRICTED (ALL PROVIDERS)", any provider active in the registry may be selected, or none if the user needs the results to encompass the entire registry. For users who have access to "PROVIDER LEVEL SECURITY" OR "CLINIC LEVEL SECURITY", the list will contain only those providers that the user is associated with

and the user must choose one of those providers. Note that selecting a provider in this list changes and/or limits the list of clinics that will be available in the clinic list. Depending on the user's access level, this may be required criteria.

- **Owning Clinic.** This list represents the list of clinics that the user is associated to as defined by the provider selected on the home screen. Depending on a user's access, this field may be a required field to request the report.
- **File Uploaded Date Range.** Enter a date range from when the file was uploaded to narrow down the search results.

### ***VIEWING HEDIS QUERIES SEARCH RESULTS***

- The search results portion of this screen displays all HEDIS queries that have been uploaded into the import staging table. In a situation when the file has been processed (overnight) then the column that says Processed will no longer say Waiting to Process.

### ***BUTTONS AND NAVIGATION***

- **Double-Click on a Record** - Double-click anywhere on the provider data file to navigate to the Edit screen for that upload file.
- **View** - Click this button to display the Edit screen for the upload file.
- **Fields and Icons**
- **Provider** - This is the provider that submitted the data query.
- **Clinic** - This is the clinic that submitted the data query.
- **Reporting Period** - This is the reporting period that was titled for this data query described by the user.
- **Filename** - This is the name of the file that was uploaded to be processed.
- **Processed** - The status of the file, processed or waiting to process.

### ***ADD/EDIT HEDIS QUERIES***

- Navigate to the add/edit screen by clicking the 'HEDIS Queries' report under the HEDIS report category. The HEDIS query search screen is displayed. Fill in search criteria as needed and press the "Search" button. Once the HEDIS query file of choice is located then press the View button to the right of the line item to View the details of the upload, otherwise to add a new query data file press the "Add Incoming Batch Message" button.

### ***BUTTONS AND NAVIGATION***

- **Update** - Saves the changes made to the user profile in the database. (This button is only available when updating an existing record.)
- **Cancel** - Use this button to return to the Provider Search screen without saving any changes made to the current program record.
- **Delete** - This marks a provider as deleted.
- **Browse** - Click this button to browse for the file to be uploaded.

- View - The view button allows you to view the original uploaded data query file or the processed file (depending on which line item it is next to). The user would save the processed data file for further analysis.
- View Error Messages - This button allows the user to see any error messages about the processed file.

### ***FIELDS AND ICONS***

- Owing Provider - This list represents the list of providers that the user currently has access to. This is determined by the user's "reporting level" indicated on the user security screen. For users who have access to "UNRESTRICTED (ALL PROVIDERS)", any provider active in the registry may be selected, or none if the user needs the results to encompass the entire registry. For users who have access to "PROVIDER LEVEL SECURITY" OR "CLINIC LEVEL SECURITY", the list will contain only those providers that the user is associated with and the user must choose one of those providers. Note that selecting a provider in this list changes and/or limits the list of clinics that will be available in the clinic list. Depending on the user's access level, this may be required criteria.
- Owing Clinic - This list represents the list of clinics that the user is associated to as defined by the provider selected on the home screen. Depending on a user's access, this field may be a required field to request the report.
- Filename - This is the name of the file that was uploaded to be processed.
- Processed File Name - This is the name of the file processed with the results of the query.
- Reporting Period - This is the reporting period that was titled for this data query described by the user.

## **INTERFACE ACTIVITY**

### ***HL7 ACTIVITY***

- Generates a summary of HL7 activity per provider/clinic or for all (based on criteria set).

#### INPUT CRITERIA

- Provider. See notes on provider in the General Information section above.
- Clinic. See notes on provider in the General Information section above.
- From Date – From Time. Use these fields to narrow down when the activity should be started.
- To Date – To Time. Use these fields to narrow down when the activity should be ending.

#### PROCESSING

- The report calculates all the types of messages processed from the provider/clinic specified.

## OUTPUT

- Provider, Clinic, HL7 Facility Code, Message Type, Log Type, # of Calls, and last call.

## ***IMPORT STATISTICS***

- Lists a summary of all data files imported through staging tables.

## INPUT CRITERIA

- Run Date Range (from/through). Enter a date range to find any imported files within that range.
- Import Type. Optional field to narrow down the results by import type.
- Import Status. Optional field to narrow down the results by import status.
- Resolved. Optional field to narrow down the results by resolved status.

## PROCESSING

- The system identifies files imported during the time frame identified and any other additional filters and displays the summary results of the file.

## OUTPUT

- Import type, Import status, Resolved status, Total records, Errors, and Warnings.
- View log. This button brings up a separate pop up window that displays the above output along with the comments field, created by field, and updated by field.
- Set as Resolved. This button sets the applicable file as resolved (i.e. meaning any errors/warnings have been reviewed and resolved).

## **ADMINISTRATIVE**

### ***E-MAIL LIST***

- Generate list of emails of users matching the search criteria. This can be cut/paste into an email tool.

## INPUT CRITERIA

- Provider - This is a list of providers in the registry. Users belong to a provider for security purposes.
- Clinic - This is a list of clinics in the registry. Users belong to a clinic for security purposes.
- Practice Type - This is the practice type specified on either the provider or clinic screen (use the circle to designate to search by provider or clinic).
- Include Only VFC Clinic Users - By checking this box a user wants to only display those users that are associated to VFC Clinics.
- Include Only Non-VFC Clinic Users - By checking this box a user wants to only display those users that are NOT associated to VFC Clinics.

- County - Optionally restrict the results to users associated with a provider or clinic in the specified county or by the user's own county address (use the circle to indicate to search by provider, clinic, or user).
- Modules - All modules can be selected or individual modules can be selected. Note: If more than one module is selected then the system will search for all users with any of the modules selected (i.e. a user does not to have all modules indicated just at least one of them).
- Functions - All security functions can be selected or individual function can be selected. Note: If more than one function is selected then the system will search for all users with any of the functions selected (i.e. a user does not to have all functions indicated just at least one of them).

#### OUTPUT TYPE

- HTML
- Extract
- Emails. If the Output Type is set to HTML then the email addresses for the matching users will appear in this box. These can be copied and pasted into an email exchange system as needed.

#### PROCESSING

- The purpose of the report is to get a list of email addresses for users that match the search criteria.

#### OUTPUT

- First Name, Last Name, Email Address

#### ***LOGINS - SUCCESSFUL AND UNSUCCESSFUL***

- Generates a list of user login activity.

#### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on provider in the General Information section above.
- Login Date Range - This is the date range of user logins to report.
- Login Type - This is used to indicate if successful, unsuccessful or all logins should be included.
- User - This is a list of all users defined in the registry. This can be used to perform specific user access tracking.

#### OUTPUT

- PDF
- Extract File

#### PROCESSING

- The purpose of the report is to list login activity.
- This can be narrowed to unsuccessful attempts or even a specific user over a date range.
- This can be useful to determine hacking attempts or unauthorized access to the registry.

#### OUTPUT

- User Information, Login Date and status of login attempt

### ***USER INACTIVITY***

- Generates an interactive list of users that matches the indicated criteria.

#### INPUT CRITERIA

- Last Login Date. This is the date that you want to see if a user has not logged in since. For example if you want to know if a user has logged in within the last 30 days then set this field to one month prior to the current date.
- User Status. Set this field to filter out active/inactive accounts.

#### OUTPUT

- HTML
- Extract File

#### PROCESSING

- The purpose of the report is to list user accounts that have not logged in after a specific time frame so they can be quickly inactivated as appropriate.

#### OUTPUT

- User Full Name (Username), User ID, Last Login Date, Gives IZ indicator, and an Interactive field for Status (Active/Inactive). This allows an administrator to inactivate user quickly if determined no longer active and needing access.

### ***USERS***

- Generates a list of users (and their security permissions) that matches the indicated criteria.

#### INPUT CRITERIA

- Provider - See notes on provider in the General Information section above.
- Clinic - See notes on provider in the General Information section above.
- Created on Date Range - Restrict the list of users to only those user accounts that were created during this date range.
- Updated on Date Range - Restrict the list of users to only those users accounts that were last updated during this date range.

- Password Expiration Date Range - Restrict the list of users to only those users accounts that have a password expiring during this date range.
- Status - Restrict the list of users that are active or inactive.
- Functions - Use this list to narrow down the list of users with these specific security functions.
- Modules - Use this list to narrow down the list of users with these specific modules assigned.

#### OUTPUT TYPE

- PDF
- Extract File

#### PROCESSING

- The purpose of the report is to list user accounts that belong to a provider/clinic and have specific access in the system.
- The report can be refined by specifying limited modules and functions to determine what users have access to sensitive areas of the application.

#### OUTPUT

- User Name, User ID, First Name, Last Name, Status, Password Expiration Date, Phone Number, Email, Created Date, Updated Date, Module and Function access, as well as provider/clinic associations.