Chapter 13
Forms and Reports

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Forms Tab

The Forms tab at the top of the ALERT IIS web page gives users access to several ALERT IIS related forms. You can also access this tab prior to logging into ALERT IIS.

To access forms, click the **Forms** tab in the top menu bar.

| home | manage access/account | forms | related links | logout | help desk | 💡 |

organization **IR Physicians** • *user* **dataentry staff** • *role* **ALERT Data Entry Staff**

Patient Level Reports

For all patients in ALERT IIS, you may generate the following reports from the Patient Reports Screen:

- Vaccine Administration Record – Pediatric
- Vaccine Administration Record – Adult
- Immunization History Report
- Immunizations Needed
- Certificate of Immunization Status (CIS) Report

Certificate of Immunization Status (CIS) Report

This form is required by Oregon law for proof of immunizations provided or medical/religious exemption with signature. The patient's demographic information and immunization history will be automatically populated by ALERT IIS. All other fields on this report are a template and should be completed in writing. To generate the CIS Report for the patient, follow these steps:

1. From a patient's Manage Patient screen or Manage Immunizations screen, click the **Reports** button.
2. At the Reports Available for this Patient section, click **Certificate of Immunization Status (CIS)** Report—this is hyperlink.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.

Oregon Certificate of Immunization Status
Oregon Health Authority, Immunization Program

Oregon law requires proof of immunization be provided or an exemption be signed prior to a child's attendance at school, preschool, child care or home day care. This information is being collected on behalf of the Oregon Health Authority Immunization Program and may be released to the Authority or the local public health department by the school or children's facility upon request of the Authority. Please list immunizations in the order they were received.

PATIENT	BISHAL	UPDATE	01/01/2010
Child's Last Name *Apellido*	First *Primer Nombre*	Middle Initial *Segundo Nombre*	Birthdate *Fecha de Nacimiento*

Mailing Address *Dirección*	City *Ciudad*	State *Estado*	Zip Code *Codigo Postal*

Parents' or Guardians' Names *Nombre de los padres o guardian*		Home Telephone Number *Número de Teléfono*	

Required Vaccines	Dose 1	Dose 2	Dose 3	Dose 4	Dose 5
Diphtheria/Tetanus/Pertussis (DTaP, Tdap, Td)	(mm/dd/yyyy) 03/01/2010	(mm/dd/yyyy) 04/01/2010	(mm/dd/yyyy) 05/01/2010	(mm/dd/yyyy) 07/01/2010	(mm/dd/yyyy) 04/13/2016
Booster Dose Tdap					
Polio (IPV or OPV)	04/13/2016				
Varicella (Chickenpox) [VZV or VAR] ☐ Check here if child has had chickenpox disease _____ (mm/dd/yyyy)	01/10/2010				
Measles/Mumps/Rubella (MMR) or	01/01/2010				
Measles vaccine only					
Mumps vaccine only					
Rubella vaccine only					
Hepatitis B (Hep B)	04/13/2016				
Hepatitis A (Hep A)					
Haemophilus Influenzae Type B (Hib) (Only children less than 5 years)					

4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.

5. To return to the Patient Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Certificate of Immunization Status (CIS) Report window.

Immunization History Report

The Immunization History Report displays demographics, contact information, and a detailed summary of the patient's immunization history. This report will typically be used as an official school record. This report should be provided to parents and guardians, as requested. To generate the report, follow these steps:

1. From a patient's Manage Patient screen or Manage Immunizations screen, click the **Reports** button.
2. At the Reports Available for this Patient section, click **Immunization History Report**, this is a hyperlink.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.

06 May 2016

ALERT Immunization Information System

IR Physicians

Immunization History Report

Patient ID: 3963

Tracking Schedule: ACIP

Patient Name: BISHAL UPDATE PATIENT

Birth Date: 01/01/2010   Gender: Male

Age: 6 years, 4 months, 5 days

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Mfg Code	Lot #	Bod Rt.	Bod St.	Provider of Information	React
DTP/aP	01/01/2010	Not Valid	Tdap	Full		BUG3716			IR Physicians	Yes(1)
	02/01/2010	Not Valid	Tdap	Full		BUG3716			IR Physicians	
	03/01/2010	Not Valid	Tdap	Full		BUG3716			IR Physicians	
	04/01/2010	Not Valid	Tdap	Full		BUG3716			IR Physicians	
	05/01/2010	Not Valid	Tdap	Full		BUG3716			IR Physicians	
	07/01/2010	Not Valid	Tdap	Full		BUG3716			IR Physicians	
	04/13/2016	1 of 5	DTaP-HepB-IPV [Pediarix ®]	5		1	IV	LD	IR Physicians	
HepB	04/13/2016	1 of 3	DTaP-HepB-IPV [Pediarix ®]	5		1	IV	LD	IR Physicians	
HPV	10/14/2014		HPV, Bivalent [Cervarix ®]	Full					IR Physicians	
Ig	01/01/2010		RIg	Full		testlot11-20-2014			IR Physicians	
MMR	01/01/2010	Not Valid	MMR	Full					IR Physicians	
Polio	04/13/2016	1 of 4	DTaP-HepB-IPV [Pediarix ®]	5		1	IV	LD	IR Physicians	
Smallpox	07/24/2013		Vaccinia (smallpox) [ACAM2000 ®]	Full					A BODY OF WISDOM	
	07/24/2013		Vaccinia (smallpox)	Full					IR Physicians	
Varicella	01/10/2010	Not Valid	Varicella	Full					IR Physicians	

Reaction Descriptions:

1:    TETCONT - Tetanus allergic reaction

     11 - Hypotonic-hyporesponsive collapse within 48 hours of immunization

Patient Comments:	Start Date:	End Date:
Allergy to baker's yeast (anaphylactic)	04/01/2016	
Allergy to streptomycin (anaphylactic)	04/03/2016	
Immunity: varicella (chicken pox)	03/01/2010	
Allergy to latex (anaphylactic)	04/01/2016	
Allergy to POLYMYXIN B	04/03/2016	

Primary Physician:

Address:

Physician's Signature

BISHAL UPDATE PATIENT   01/01/2010

4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.

5. To return to the Patient Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunization History Report window.

Immunizations Needed Report

The Immunizations Needed report displays demographics, contact information, immunization record, and immunizations recommended by date according to the tracking schedule assigned to the patient. This report can be provided to parents and guardians for their records and helps to identify upcoming immunizations for their children. In addition, it provides a place for the next appointment date and organization phone number. To generate the report, follow these steps:

1. From a patient's Manage Patient screen or Manage Immunizations screen, click **Reports**.
2. At the Reports Available for this Patient section, click **Immunizations Needed**, which is a hyperlink.

3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.

ALERT Immunization Information System
Immunization Record

Patient Name (L, F, M): PATIENT, BISHAL, UPDATE
Birth Date: 01/01/2010   Gender: Male   Tracking Schedule: ACIP
      Age: 6 years, 4 months, 11 days

Patient Comments:			From Date:	To Date:
Allergy to POLYMYXIN B			04/03/2016	

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine	Dose
DTP/aP	01/01/2010	Not Valid	Tdap	Full
DTP/aP	04/01/2010	Not Valid	Tdap	Full
DTP/aP	07/01/2010	Not Valid	Tdap	Full
DTP/aP	04/13/2016	1 of 5	DTaP-HepB-IPV	5
HepB	04/13/2016	1 of 3	DTaP-HepB-IPV	5
HPV	10/14/2014		HPV, Bivalent	Full
Ig	01/01/2010		RIg	Full
MMR	01/01/2010	Not Valid	MMR	Full
Polio	04/13/2016	1 of 4	DTaP-HepB-IPV	5
Smallpox	07/24/2013		Vaccinia (smallpox)	Full
Varicella	01/10/2010	Not Valid	Varicella	Full

Immunizations Due Record

Vaccine	Date Needed
DTaP	05/11/2016
HepA, NOS	01/01/2011
HepB, NOS	05/11/2016
Flu NOS	07/01/2015
MMR	01/01/2011
Polio-Inject	05/11/2016
Varicella	01/01/2011

Appointment: ___/_____/_____   Provider Phone Number: (541) 466-3546 x3082

4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
5. To return to the Patient Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunization History Report window.

Vaccine Administration Record – Pediatric

The Vaccine Administration Record – Pediatric displays English and Spanish versions of the pediatric VAR form approved by the Oregon Immunization Program. The forms are not populated with patient or immunization data by ALERT IIS. To generate the form, follow these steps:

1. From a patient's Manage Patient screen or Manage Immunizations screen, click the **Reports** button.
2. At the Reports Available for this Patient Section, choose the language you would like to print under the Additional Information column for the Vaccine Administration Record – Pediatric row.
3. Click **Vaccine Administration Record - Pediatric**, which is a hyperlink underlined and in blue text. The report will be generated in a new browser window.
4. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.
5. To print the form, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
6. To return to the Patient Reports screen, close the browser window that contains the VAR.

Vaccine Administration Record – Adult

The Vaccine Administration Record – Adult displays English and Spanish versions of the adult VAR form approved by the Oregon Immunization Program. The forms are not populated with patient or immunization data by ALERT IIS.

To generate the form, follow the steps above for Vaccine Administration Record – Pediatric.

Ad Hoc Reports

The Ad Hoc reports function in ALERT IIS allows the user to create customized reports. Filters within the Ad Hoc reporting function help to narrow a search by patient active status, immunization ownership, age range, vaccination date range, and/or many other factors. The Ad Hoc reporting function produces two types of reports: 1) Ad Hoc List, produces a list with information about selected patients and immunizations; and 1) Ad Hoc Count produces counts, either of patients or of immunizations.

The tables below define terms used in Ad Hoc reports.

Items to filter on:	
Patient Factors	
Active Status	Whether the patient is active or inactive for your organization.
Age Range	Returns patients within a specified age range.
Birth Date	Birth Date of the Patient
City	City where patient currently resides.
Comment	Comments related to the patient.
County of Birth	Birth County of the patient.
County of Residence	County where the patient currently resides.
Gender	Gender of the Patient.
Has 2 or More Immunizations	Filters patients as specified that have two or more immunizations.
Language Preference	Patients preferred language.
Patient ID	Patients Alert IIS ID.
Primary Care Physician	Patients Primary Care Physician.
School	Patients school.
State	State where patient currently resides.
Zip	Zip Code where patient currently resides.
Immunization Factors	
Administering Clinician	Clinician who administered the immunization.
CVX Code	CVX Code of an administered vaccine.
Display Inadvertent Vaccine Group	Display allowable inadvertent vaccines for vaccine group. (i.e. Tdap vaccine for DTP/aP vaccine group)
Historical Immunization	Whether the immunization was a new or historical immunization.
From Inventory	Whether the immunization was administered from the organizations inventory.

Owned Immunization	Whether the immunization was given by your organization.
Source of Last Update	Displays how the immunization was sent (user interface, electronic data exchange, etc).
Trade Name	The Trade Name of the immunization.
Vaccination Date	Date of when the vaccination was administered.
Vaccine	Vaccine that was administered
Vaccine Eligibility	Vaccine Eligibility Code for the vaccination administered
Vaccine Group	Vaccine Group of vaccination that was administered.
Vaccine Lot	The log from which the vaccine was aliquoted.
Valid Immunization	Whether the immunization is valid.
Comparison	
BEFORE	Used for dates
EQUALS	Same in comparison
NOT EQUAL TO	Not the same in comparison
AFTER	Used for dates
BETWEEN	Used for dates
IS	Exact equivalent
IS NOT	Not the equivalent
Selected Filters	
Edit	Edit an applied filter
Remove	Remove an applied filter
And/Or	Changes the operator between 'And' and 'Or' depending upon which is initially selected. Requires at least two filters to be applied.
Group	Groups filtered sections together in the report
Ungroup	Removes grouped filtered sections

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Notes: Patients whose information is added or changed on the day the report is run will not appear in the results until the following day.

Ad Hoc reports run against all patients associated with your organization. To disassociate a patient from your organization you must change their status in the organization information section of the patient's record.

Two default filters have been added to the Ad Hoc Reports. The first filter is "Active Status EQUALS Yes" and the second filter is "Owned Immunization EQUALS Yes".

- If you remove the "Active Status EQUALS Yes" as a Selected Filter the query will return all patients except those that have an Active Status EQUAL to P – permanently deceased.
- When including "Owned Immunization EQUALS Yes" as a Selected Filter you must include at least one immunization field to display/factor on for the report.

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Ad Hoc List Reports

To produce a list of information about selected patients:

1. Click **Ad Hoc List Report** under the Reports section of the menu panel.
2. Select the items that you would like to display on the report by double-clicking the desired items from the left column (for example, Patient Last Name) or by highlighting the item and clicking **Add**. This will copy the item to the right column and add it to your report.

Create a Customized List Report

What items would you like to display on the report?

Most Common Items
- Birth Date
- Historical Immunization
- Patient First Name
- Vaccination Date
- Vaccine
- Vaccine Eligibility
- Vaccine Lot
- Other Patient Items

[Add >]
[< Remove]
[< Remove All]

Most Common Items
- Patient Last Name

How would you like the report to be sorted?

Item to sort on [(not sorted) ▼]   Order ⦿ First-to-Last ◯ Last-to-First

A report takes longer to run if you want it to be sorted.

How would you like to filter the data?

Item to filter on [Owned Immunization ▼]

Comparison [EQUALS ▼]

Value to compare to [Yes ▼] [   ] 🔳

and [▼] [   ] 🔳   [Add/Save Edit]

Selected Filters

```
Active Status EQUALS Yes
    AND
Owned Immunization EQUALS Yes
```

[Edit]
[Remove]
[And/Or]
[Group]
[UnGroup]

[Generate]   [Cancel]

3. Select the single item by which you would like to have the report sorted and click the sort order (first-to-last or last-to-first). Note: Sorting the report will increase the time it takes to process.

4. Under **Item to filter on**, select an item that you would like to add as a filter using the drop down list. For example, Birth Date could be an item used as a filter.

5. Filters in ALERT IIS are used to narrow information down so that it answers a user's query. Under **Comparison**, select a word from the drop down list that best describes the type of comparison you wish to make; for example, BETWEEN or EQUALS.

6. Under **Value to compare to**, either choose a value from the drop down list in the left field, type in a value, or enter a date in the right field, if applicable.

7. Under **and**, select another value from the drop down list in the left field, type in a value, or enter the ending date in the right field, if applicable.

8. Click the **Add/Save Edit** button. Repeat steps 4-8 for each item you wish to filter.

9. When finished adding filter items:
   a. Within the Selected Filters section, to change AND to OR, highlight 'AND' and click the **And/Or** button. Alternatively, the value can also be switched from OR to AND by following the same process.
   b. Group statements together by highlighting two filter statements and clicking the **Group** button. This groups the filters together in the report.
   c. Highlight grouped statements and click the **Ungroup** button to ungroup it. This removes the filters from being grouped together in the report.
   d. Highlight a statement and click the **Remove** button to remove it from the selected filters.
   e. Highlight a statement and click the **Edit** button to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click the **Add/Save Edit** button.
10. Click the **Generate** button. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

*Note: Organization can set the row count to display in the report on the Security Options Screen which can be between 1-999,999. If user tries to generate report which has more row than set on the Security Option Screen than the following message is returned:

Ad Hoc Count Report

To produce a count of selected patients or immunizations:

1. Click **Ad Hoc Count Report** under the Reports section of the menu panel.
2. Select whether **Patients** or **Immunizations** will be counted by clicking the appropriate radio button at the top of the screen.

Create a Customized Count Report
Would you like to count Patients or Immunizations?
◉ Patients ○ Immunizations
What factors would you like to use to group the counts on the report?

Most Common Items
  Birth Date
  Historical Immunization
  Vaccination Date
  Vaccine
  Vaccine Eligibility
  Vaccine Lot
Other Patient Items
  Active Status

Add >
< Remove
< Remove All

You may select a maximum of three factors to group the counts

3. Select the factors you would like to use to group the counts on the report by double-clicking on the desired item from the left column (for example, Vaccine) or by highlighting the item and clicking the **Add** button. This will copy the item to the right column so that it can be used in your report. You can choose a maximum of three factors.

How would you like to filter the data?
Item to filter on Owned Immunization
Comparison EQUALS
Value to compare to Yes
and
Add/Save Edit
Selected Filters

4. Under **Item to filter on** select an item that you would like to add as a filter using the drop down list. For example, Owned Immunization could be an item used as a filter.
5. Under **Comparison**, select a word from the drop down list that best describes the type of comparison you wish to make. For example, EQUALS is one comparison operator.

6. Under **Value to compare to**, either choose a value from the drop down list in the left field, type in a value and/or enter a date in the right field.
7. Under **and**, select another value from the drop down list in the left field, type in a value and/or enter the ending date in the right field, if applicable.
8. Click on **Add/Save Edit**. Repeat Steps 4-8 for each item you wish to filter.
9. When finished adding filter items, you may do the following:
    a. Group them together by highlighting two filter statements and click **Group**.
    b. Change AND to OR by highlighting 'AND' and clicking the **And/Or** button. OR can also be switched to AND by following the same process.
    c. Highlight a grouped statement and click on **Ungroup** to ungroup it.
    d. Highlight a statement and click on **Remove** to remove it from the selected filters.
    e. Highlight a statement and click on **Edit** to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click on **Add/Save**
10. Click **Generate**. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

Ad Hoc Report Status

1. The Ad Hoc Report Status screen will display after you click **Generate** on the Ad Hoc Count or Ad Hoc List Report screens. You may also access the status screen by clicking on Ad Hoc Report Status under the Reports section of the menu panel.

Ad Hoc Report Status				Refresh	Cancel	
Report Type	Provider Organization	Started	Completed	Status	Row Count
LIST	Oregon Immunization Program	08/18/2015 07:00 AM		PROCESSING	0

Ad Hoc Report Status				Refresh	Cancel	
Report Type	Provider Organization	Started	Completed	Status	Row Count
LIST	Oregon Immunization Program	08/18/2015 07:00 AM	08/18/2015 07:02 AM	DONE	88938

Ad Hoc Report Status   Refresh   Cancel

Report Type	Provider Organization	Started	Completed	Status	Row Count
LIST	Oregon Immunization Program	08/18/2015 07:00 AM	08/18/2015 07:02 AM	DONE	88938
COUNT	Oregon Immunization Program	08/18/2015 07:06 AM		PROCESSING	0

Ad Hoc Report Status   Refresh   Cancel

Report Type	Provider Organization	Started	Completed	Status	Row Count
LIST	Oregon Immunization Program	08/18/2015 07:00 AM	08/18/2015 07:02 AM	DONE	88938
COUNT	Oregon Immunization Program	08/18/2015 07:06 AM	08/18/2015 07:07 AM	DONE	2

2. Click **Refresh** occasionally to check the status of the report. Once the underlined report type appears in blue, click it. The report will display directly on this screen.

3. Export the data as a text file, spreadsheet, or PDF by selecting the appropriate link.

4. If you wish to print the report, click **Print** under the **File** menu within the application (text file, spreadsheet, or Adobe® Reader). In the print dialog box, adjust the print options as necessary, and then click either **Print** or **OK**, depending on the application.

5. The user has been provided with an option to enter the maximum number of ad hoc list records user can view. The user can change this setting by going to Manage Access//Account tab and under the Security option on portal menu. An update on this option now allows user to enter between 0- 999999 values. **Reminder** the value '0' here means a default max value of 10,000.When running the ad hoc report, if the system generates more records than what was set as max value in the security option by user. The following message will appear. "More records were found than limit. Please refine your search criteria

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Note: Ad hoc reports are retained for 7 days for a user. ALERT IIS will retain all count and list reports for that period. For users who belong to multiple organizations, ALERT IIS displays links to all reports run by the user with a Provider Organization column displayed on screen to differentiate the reports.

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Assessment Reports

The Assessment Report feature in ALERT IIS provides an analysis of an organization's immunization coverage rates. The following is a brief overview of the data that are returned on each table within the Assessment Report. Routinely reviewing patient records and assessing vaccination coverage rates are proven strategies to improve vaccination coverage in your organization.

1. Click **Assessment Report** under the Reports section of the menu panel.

2. Select the patient population to be assessed by clicking one of the following:
3. All Patients Associated with <Organization Name>: Choose this option to view immunization data on all patients associated with your organization.
4. Select the age, birth date range, or age range of the patients by choosing one of the following:
   a. Less than 72 months old: Choose this option to return all patients who are 72 months or younger.
   b. Birth date range: Choose this option to enter a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field. Alternatively, use the calendar icons beside each field to enter the dates.
   c. Age range: Choose this option to enter an age range. Enter the youngest age range in the first field; use the drop down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop down list to choose days, months, or years. You cannot search for patients older than 72 months.

d. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal history as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return an assessment report that counts patients with sufficient refusal comments as being up-to-date.

e. Select the assessment report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the assessment criteria date will be included in the report.

Assessment Report

Select Patient Population

○ Patients Associated with Selected Site   [▼]

◉ All Patients associated with IR Physicians

Select Age or Birth Date Range

○ Less than or equal to 72 months old

○ Birth date range   Earliest Birth date: [＿＿＿] 📅   Latest Birth date: [＿＿＿] 📅

◉ Age range   Youngest Age: [1] [Days ▼]   Oldest Age: [2] [Years ▼]

Options for Benchmarking

◉ Standard Assessment

○ Assess Patients with Sufficient Refusal History as Covered

Select Evaluation Date

[07/07/2011] 📅

[Generate]   [Cancel]

5. Click **Generate.**

6. The Assessment Report Status screen will display. Some reports will automatically generate and will appear in the Job Name – Evaluation Date and Age Range – Evaluation Date Sections. The number of reports that will automatically generate will vary based on the age range of patients assessed.

Assessment Report Status   [Refresh]

[Cancel]

Assessment of Patients With At Least One Missing Age Specific Benchmark

[3 Months ▼]   [Generate]

Assessment Report Output Options

Job Name - Evaluation Date	Started	Status
(Assessment Report) IR Physicians - 07/07/2011	07/21/2011 10:41 AM	2 %
(Missed Opps Patients) IR Physicians - 07/07/2011	07/21/2011 10:41 AM	2 %

Records Meeting Criteria

Age Range - Evaluation Date	Number of Patients in Age Range	Started	Status
< 12 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
12 - 23 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
24 - 35 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
36 - 72 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
All Age Ranges - 07/07/2011	0	07/21/2011 10:41 AM	2 %

7. Click **Refresh** occasionally to check on the progress of the reports. When the reports are ready, the job name will appear underlined and in blue text and the status will display as Complete.

8. Once reports are complete, you may view the reports that automatically generated, or you may run additional reports. At this screen you may do the following:

9. Select an age from the drop down list provided and click on Generate (to the right of the age drop down list). Create an assessment report listing patients for an age-specific benchmark by selecting an age from the drop down list and clicking **Generate**. This report lists the patient's name, address, telephone number, and the vaccinations that they did or did not complete or refused by the benchmark age. A patient will show on the report if they missed at least one age-specific benchmark.

10. Click the underlined job name.

11. The report listing patients by benchmark age will have a job name of: (Benchmark Patient Listing) <Organization Name> - <Benchmark Age>.

12. The assessment report will be called: (Assessment Report)<Organization Name> - <Date>.

13. A report listing all patients who have missed a vaccination opportunity will have a job name of: (Missed Opps Patients)<Organization Name>-<Date>.

14. Click an underlined age range to view a listing of patients returned that fall within the specified range. This list will give the name, address, and telephone number for all patients meeting the record criteria. To view patients for all age ranges that meet the criteria, click the All Age Ranges link.

15. The report displays in Adobe Reader® if you clicked one of the report or age range links. To print one of the reports, click on the printer icon on the Adobe® toolbar.

16. Click **OK** in the Print Dialog box

17. To return to the Assessment Report Status screen, click the Back button in the browser.

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Note: Patients with Refusals

If the option to Assess Patients with Sufficient Refusal History as Covered is selected when the assessment report is run, patients who fall short of needed, valid doses but have sufficient refusals to meet the benchmark are included within the count as if they received the needed doses.

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Understanding the Assessment Report

The following is a brief overview of the data that is returned on each table within the assessment report.

Table 1

Age Group	Records Analyzed	Inactive	Records Meeting Criteria
36 -72 Months of Age	50	0	50
24 - 35 Months of Age	51	0	51
12 -23 Months of Age	54	0	54
< 12 Months of Age	46	0	46
Total	201	0	201

Age Group: This column displays the age ranges used for evaluation.

Records Analyzed: This column displays the count of selected patients within the age group that are included in this report. This is determined by the age range chosen when generating the report.

Inactive: This column displays the count of selected patients within the age group that are not active in your clinic. Refer to Chapter 10, Managing Patients, for information on marking patients as inactive

Records Meeting Criteria: This column displays the count of selected patients within the age group who are Active in your organization.

Table 2

	Immunization Status	
Age(months)	Up to Date [1-4] (UTD)	Late [1-4] (UTD)@Assessment
36-72 Months of Age		
72	.0%%	.0%%
24	.0%%	.0%%
12		.0%
7	.0%	
24-35 Months of Age		
24	.0%	.0%
12	.0%	.0%
7	.0%	.0%
12-23 Months of Age		
12	.0%	.0%
7	.0%	.0%
< 12 Months of Age		
7	.0%	.0%

1) UTD by 7 months equals 3 DTaP, 2 HepB, 2 HIB, 2 Polio
2) UTD by 12 months equals 3 DTaP, 2 HepB, 2 HIB, 2 Polio.
3) UTD by 24 months equals 4 DTaP, 3 HepB, 3 HIB, 1 MMR, 3 Polio, 1 Varicella.
4) UTD by 72 months equals 5 DTaP, 3 HepB, 4 HIB, 2 MMR, 4 Polio, 1 Varicella.
Late UTD equals the same benchmark for the age group, but it is assessed on the date the report was run.

Age (Months):   This column displays the age of the patient on the assessment date.

Up-to-Date: This column displays the percent of patients (out of the total number of active patients for that age group) meeting the criteria on the assessment date. The criteria are given at the bottom of the report

page. For example, a seven-month-old UP-TO-DATE patient who has met the criteria will have had three DTaP, two HepB, two HIB, and two Polio vaccinations.

Late UP-TO-DATE @ Assessment: This column displays the percent of patients (out of the total number of active patients for that age group) meeting the criteria on the date the report was run, rather than on the assessment date.

Table 3

Age Specific Immunization Benchmarks							
UTD Grid	DTaP	Hep B	Hib	MMR	Polio	Prevnar	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	3	
@ 9 months	3	2	2		2	3	
@ 12 months	3	2	2		2	3	
@ 16 months	4	3	3	1	3	4	1
@ 19 months	4	3	3	1	3	4	1
@ 21 months	4	3	3	1	3	4	1
@ 24 months	4	3	3	1	3	4	1
@ 72 months	5	3	4	2	4	4	1

The Age-Specific Immunization Benchmarks chart shows how many doses of each vaccine a patient should have by the age listed at the left to be determined UP-TO-DATE. This chart is used to create the Assessment of Patients Meeting Age-Specific Benchmarks table.

Table 4

								Total Meeting Age Criteria	
Assessment of Patients Meeting Age Specific Benchmarks									
UTD Age	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella	Total Meeting Age Criteria	% Coverage
3 Months	183	184	187		178	40		201	17.4%
5 Months	180	182	180		175	42		201	17.9%
7 Months	175	184	189		181	42		201	19.4%
9 Months	179	184	190		181	42		201	19.4%
12 Months	136	143	148		141	42		155	25.2%
16 Months	103	93	137	118	97	19	116	149	.7%
19 Months	103	95	137	121	101	25	119	149	.7%
21 Months	127	123	137	131	105	39	128	147	4.1%
24 Months	89	90	92	95	95	42	94	101	40.6%
72 Months	46	45	47	44	45	0	49	50	.0%

UP-TO-DATE Age: This column shows the maximum age the patient has attained by the assessment date.

Vaccine Columns: These seven columns display the count of the patients who have met the vaccination criteria by the UP-TO-DATE age.

Total Meeting Age Criteria: This column gives a count of all the patients who are at least the age listed under UP-TO-DATE Age. However, the 72 Months UP-TO-DATE Age category includes patients from 48 to 72 months of age.

% Coverage: This column displays the percentage of patients meeting all UP-TO-DATE criteria, out of a total of all patients at least the age listed under UP-TO-DATE Age.

Table 5

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations		
<= 12 Months of Age	5	10.9%
1 Vaccine Needed	2	40.0%
2 Vaccines Needed	3	60.0%
3 Vaccines Needed	0	.0%
4 Vaccines Needed	0	.0%

The report breaks down the children who could have been brought up to date into three tables,≤ 12 months, 24-36 months, and 60-72 months. This is an example of ≤ 12 months.

Column 1:   In the first row of column one, the age range of patients examined in this table is displayed. In subsequent rows within this column, the number of vaccines needed by this group of patients is displayed.

Column 2:   In the first row of column two, a count is displayed of all patients for this age group who are behind schedule for four or fewer vaccinations. Subsequent boxes display a count of patients for this age group who need additional vaccinations to be up-to-date.

Column 3:   In the first row of column three, a percent is displayed of all patients for this age group who are behind schedule for four or fewer vaccinations (out of the total number of patients for this age group). Subsequent rows within this column display a percentage of patients for this age group who need additional vaccinations to be up-to-date.

Table 6

Children Who Got A Late Start or Have Dropped Off Schedule After A Good Start			
Late Start Rates	Beginning > 3 mo. age	100.0%	36-72 mo. age group
		21.6%	24-35 mo. age group
		98.1%	12-23 mo. age group
Drop Off Rates	60-72	.0%	24 month status
	48-59	.0%	24 month status
	36-47		24 month status
	24-35 mo. age	.0%	24 month status
	12-23 mo. age	5.6%	12 month status

Late Start Rates: A patient who did not receive one full dose of DTaP by 90

days of age is considered to have gotten a late start. The values in column three of the late start row are the percentages of patients (within the age groups listed in column four) who have not received the first DTaP dose by 3 months of age.

Drop Off Rates: The drop off rate section of this chart shows the percentage of patients (column three) in various age groups (column two) who have not gone beyond 12 or 24-month status (column four) in their immunizations. Immunization status is calculated using the formula outlined at the bottom of the chart.

Table 7

Patients Who Do Not Have a Birth Dose of HepB and Have Not Completed the 3 Dose Series		
	Number 4	Per Cent 5
Patients Missing Birth Dose Of Hep	14	7.0%

The Hep B chart gives the number and percentage of patients who did not receive a birth dose of the Hep B vaccination and who did not complete the three-dose series. Patients evaluated are between six and 72 months old and have at least one immunization in ALERT IIS.

Table 8

Missed Opportunity Assessment

Age Group on Evaluation Date	Total Patients in Age Group	Patients Not up to Date		Missed Opportunity on Last Visit	
		Count	Percent	Count	Percent
<12 months 7 month benchmark	6	5	83.3%	1	16.7%
12-23 months 12 month benchmark	20	16	80.0%	14	70.0%
24-35 months 24 month benchmark					
36-72 months 24 month benchmark					

Age Group on Evaluation Date: This column lists the age group of the selected patients and the immunization benchmark used for evaluation.

Total Patients in Age Group: This column gives the total number of patients within the age group listed in the first column.

Patients Not Up to Date: This column gives the count and percentage of patients who are not up to date for the benchmark listed in column one.

Missed Op on Last Visit: This column gives the count and percentage of patients who are **not** up to date **and** who had a missed opportunity for vaccination on the last visit on or before the evaluation date.

The missed opportunities report lists all your organization's patients who have missed opportunities to be vaccinated. This report lists the patient's first and last names, birth date, and date of each missed opportunity by vaccine group.

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Note: Missed Opportunities Assessment
Keep in mind, since ALERT IIS is used for reporting immunization records, it only identifies patients that had at least one immunization at their last visit, but missed an opportunity to receive additional immunizations. The Missed Opportunities Assessment in ALERT IIS will not include any patients that were treated at your organization for any other reason except vaccination purposes.

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Benchmark Reports

Benchmark Report

Select Patient Population

- ○ Patients Associated with Selected Site [dropdown]
- ○ All Patients residing in Baker County
- ○ All Patients residing in Baker County and all patients associated with IR Physicians
- ◉ All Patients associated with IR Physicians
- ○ Patients who did NOT meet the benchmark
- ○ Patients who DID meet the benchmark
- ◉ All Patients, regardless of whether they met the benchmark or not

Select Age or Birth Date Range

- ○ Less than or equal to 72 months old
- ○ Birth date range — Earliest Birth date: [____] ☐   Latest Birth date: [____] ☐
- ◉ Age range — Youngest Age: [____] Days ▾   Oldest Age: [____] Days ▾

Options for Benchmarking

- ◉ Standard Assessment
- ○ Assess Patients with Sufficient Refusal History as Covered

Select Evaluation Date

[____] ☐

Select Benchmark

Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	3	
@ 9 months	3	2	2		2	3	
@ 12 months	3	2	2		2	3	
@ 16 months	4	3	3	1	3	4	1
@ 19 months	4	3	3	1	3	4	1
@ 21 months	4	3	3	1	3	4	1
@ 24 months	4	3	3	1	3	4	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 19 months			431	43133	431331		
@ 36 months			431	43133	431331		

Clear Selection

Benchmark reports allow ALERT IIS users to retrieve a list and count of patients who have met an immunization benchmark or predefined series of benchmarks. The resulting report may be viewed in ALERT IIS, exported as a text file, exported as a spreadsheet, or exported as a PDF file.

To generate a Benchmark report:

1. Click **Benchmark Report** under the Reports section of the menu panel.
2. Select the patient population to be assessed by clicking on one of the following:

a. Patients Associated with Selected Site: immunization data on all patients associated with the site selected from the drop down list at the right. Patients Associated with <Organization Name> OR Patients Residing in < County Name>: immunization data on patients associated with your organization and those residing within a given county. This option is only available for county organizations. (City organization functionality has been disabled in ALERT IIS.)

b. All Patients Associated with <Organization Name>: immunization data on all patients associated with your organization.

3. Click one of the following to specify the patients to return on the report:

a. Patients who did NOT meet the benchmark: a list of patients who did not meet the benchmark(s) defined in the table.

b. Patients who DID meet the benchmark: a list of patients who met the benchmark(s) defined in the table.

c. All patients, regardless of whether they met the benchmark or not: a list of all patients meeting the criteria defined in the table.

4. Select the age, birth date range, or age range of the patients by choosing one of the following. You may only enter up to age six years.

a. Less than or equal to 72 months old: all patients who are 72 months old or younger.

b. Birth date range: a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field that you wish included on the report or use the calendar icons beside each field to enter the dates.

c. Age range: an age range. In the Youngest Age field, use the drop down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop down list to choose days, months, or years.

5. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal History as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return a benchmark report that counts patients with sufficient refusal comments as being up-to-date.

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Note: Refusals of Vaccine

In order for patient refusals of vaccine to be calculated correctly on assessment and benchmark reports, an appropriate Start Date must be entered for refusal comments on the Patient Comments tab. Refer to the Managing Patients Chapter 10 of this manual for more information.

6. Select the report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the evaluation date will be included in the report.
7. Select the benchmark(s) to be used on the report:
8. To select one or more single vaccine benchmarks within a single row, click on the box where the vaccine and the number of months intersect. For example, clicking on the box with 4 in it where DTaP and @ 19 months intersect will result in a report with this benchmark included.
9. To select all benchmarks in a row, you may click on the first box in the row that indicates @ X months.

Select Benchmark

Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	3	
@ 9 months	3	2	2		2	3	
@ 12 months	3	2	2		2	3	
@ 16 months	4	3	3	1	3	4	1
@ 19 months	4	3	3	1	3	4	1
@ 21 months	4	3	3	1	3	4	1
@ 24 months	4	3	3	1	3	4	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 19 months			431	43133	431331		
@ 36 months			431	43133	431331		

10. To select benchmarks in a predefined series, select one of the 431, 43133, or 431331 combinations at the bottom of the table.
11. Click the **Generate** button.
12. The Benchmark Report Status screen will display. Click on Refresh occasionally to check on the progress of the report. When the report is ready, click on the blue Benchmark hyperlink. Once this link is clicked, ALERT IIS will display the Benchmark report at the bottom of the Benchmark Report Status screen. In addition, you may do one of the following:
13. Click the **Export as Text** link to display the report in text file format.
14. Click the **Export as a Spreadsheet** link to display the report in a spreadsheet format.
15. Click the **Display as a PDF** link to display the report in Adobe® Reader.

No	First Name	Last Name	Birth Date	Primary Phone Number	Street	City	State	Zipcode	Polio (2)
1	VIOLET	DALLMAN	10/20/2009		574 PICKNEY	JUNTURA	OR	97753	N
2	VIOLET	DALLMAN	10/20/2009		574 PICKNEY	JUNTURA	OR	97753	N
3	PATIENT	ENTER	01/01/2010	(111) 111-1111	123 MAIN WAY	PORTLAND	OR	53704	N
4	KEVIN	KIDS	01/01/2010				OR		N
5	PATIENT	NIC	11/01/2009				OR		N
6	AARON	PATIENT	09/21/2009		664 NORTH	AUMSVILLE	OR	97375	N
7	CASH	PATIENT	07/21/2010	(111) 222-3333	TEST123	PORTLAND	OR	12345	N
8	ENTERNEW	PATIENT	01/01/2010				OR		N
9	HLSEVEN	PATIENT	01/01/2010		123 TEST ST	PORTLAND	OR	97089	N
10	NEW	PATIENT	08/06/2010				OR		N
11	QUICK	PATIENT	01/01/2010				OR		N
12	QUICK	PATIENT	01/01/2010				OR		N
13	QUICK	PATIENT	01/01/2010				OR		N
14	TEST	PATIENT	07/20/2010				OR		N
15	TEST	PATIENT	09/21/2010				OR		N
16	RICK	RICKTEST	12/17/2009	(608) 555-1212	6406 BRIDGE ROAD	MADISON	WI	53784	N
17	PATIENT	SIMON	11/01/2009						N

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Note: The size of your file is not limited when you choose to export the Benchmark report as text. However, to export as a spreadsheet, there is a limit of 65,535 lines. The information message "file not loaded completely" will display to indicate that part of the report was truncated. When the report is displayed as a PDF, the report will be limited to about 5,000 lines (119 pages); if the report is more than 5,000 lines, a red error report banner will display.
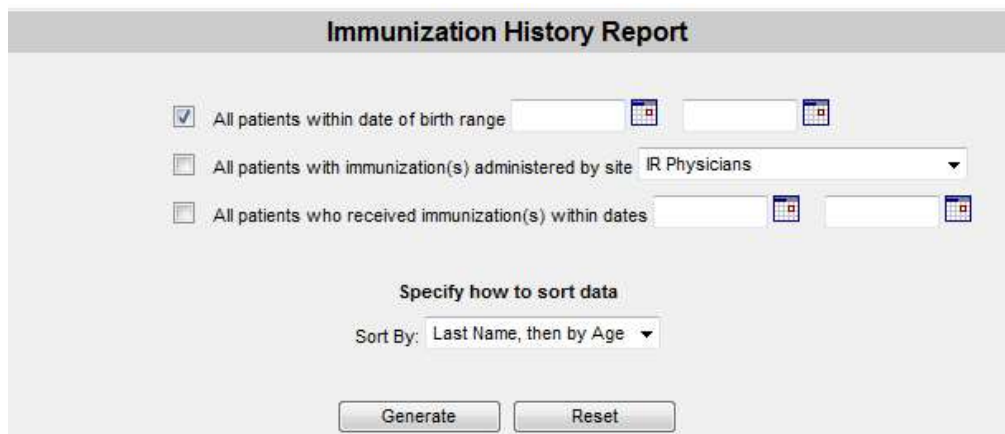
■■■■□□

The Benchmark Report shows a list of all patients who met the filter criteria specified when you set up the report. The report gives you a count and percent of how many patients met the specified criteria. It lists patients by first and last name, date of birth, phone number, and address. The Y or N in the columns after each patient's demographic information indicates whether the patient met the criteria for that vaccine and benchmark age.

Group Patients Report

The purpose of Group patients is to run either the Immunization History Report for a group of selected patients. To run one of these reports, complete the following steps:

1. Click **Group Patients** under the Reports section of the menu panel.

Immunization History Report

☑ All patients within date of birth range [ ] 📅 [ ] 📅

☐ All patients with immunization(s) administered by site IR Physicians ▼

☐ All patients who received immunization(s) within dates [ ] 📅 [ ] 📅

Specify how to sort data

Sort By: Last Name, then by Age ▼

[Generate]   [Reset]

2. To run a report for patients in a specific birth date range, click on the check box on the first line. Enter a from birth date and to birth date in MM/DD/YYYY format.
3. To run a report for patients who have immunizations administered by one of your sites, click on the check box on the second line. Choose a site from the drop down list. By selecting this option, you will limit this report to immunizations administered at your site.
4. To run a report for patients who have an immunization in a specific date range, click on the check box on the third line. Enter a from and to date in MM/DD/YYYY format.

    ■■■■■□□
    Note: You may combine any of the criteria in the above steps. The system only selects patients who fulfill all the criteria you specify.
    ■■■■■□□

5. You may choose a sort order. Your two options are either by Last Name then Age or by Age, then Last Name.
6. If you wish to start over, click the **Reset** button. The system erases all the criteria you entered and starts with a fresh page. You may proceed to enter your criteria again.
7. When criteria are completed, click the **Generate** button. Click the **Refresh** button periodically (use same language used in assessment reports section) The system starts to generate the report and takes you to the Group Patient Reports Request Status screen.

8. After the report finishes generating, the top line on the Group Patient Reports Request Status screen becomes a hyperlink. Click the hyperlink.

Group Patient Reports Request Status				Refresh
Report Name	Started	Completed	Status	Patients
Immunization_History_Report	2010-09-16 05:55:59.0	2010-09-16 05:55:59.0	100%	3
Immunization_History_Report	2010-09-23 13:03:19.0	2010-09-23 13:03:24.0	100%	5

9. The system displays the report output in PDF.

Reminder/Recall

From the Reports menu option, you may generate reminder and recall notices, which include letters, mailing labels, and patient listings.

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Note: Generation of reminder and recall notices
Reminder and recall notices can be generated for each patient, if the following conditions are met:
- The status is Active in the Patient Information Section for your organization.
- The Allow Reminder and Recall Contact? indicator in the Patient Information Section is Yes.
- The patient has complete address information listed in the Address Information Section.

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Reminder Request Status screen

Depending upon the number of patients associated with your provider organization, it may take five minutes or more to generate the data for the various reports. While the data is being generated, the Reminder Request Status screen indicates the percentage of completion. Periodically click on Refresh to update the status.

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Note: Once you reach the Reminder Request Status screen, it is not necessary to stay at this screen while your report is being created. You may go anywhere in ALERT IIS while the report is generating and may return to the status screen by clicking on the Check Reminder Status link under Reports on the menu panel. Likewise, you may close out of ALERT IIS and return to the status screen by clicking on the Check Reminder Status link after logging in again.

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Summary Screen

When the report is complete, you may click on the blue date hyperlink to go to the Reminder Request Process Summary screen. The Summary screen lists the number of patients involved in the search and the criteria that were used to define the search. From the Summary screen, you may create various reminder output options.

Reminder Request Process Summary

Reminder Request Criteria Name:

Step	Criteria Evaluated at this Step	Patients
1	Patients **associated** with *IR Physicians*.	39
2	Patients **immunized** by *IR Physicians*.	30
3	Patients that are **active** within *IR Physicians* and **allow Reminder & Recall Contact.** Additional criteria includes: • Patients **born between 01/01/2007 and 01/01/2010**; • **County** is not specified; • **School** is not specified; • **Provider** is not specified;	17
4	Patients that have a **Valid Address**. Additional criteria includes: • **City** is not specified • **Zip Code** is not specified.	10
5	Patients that meet the following criteria regarding vaccination status: • Patients that are **Due Now** for one or more vaccinations **on or before** ; • Use all **vaccine groups**; • Use **tracking schedule** associated with each patient..	5
	Total Number of Patients Eligible for Reminder	5

Last Notice Date Options

On the bottom of the Reminder Request Process Summary screen, you have the option of resetting the last notice date, which will affect future reminder/recall notices generated using this information. Your options on the last notice date table include:

Last Notice Date Options

Preview Patients that will display on the Reminder Recall Report.	Preview Patients
*Increment last notice date for all patients **eligible for this reminder**.*	Increment Eligible
*Increment last notice date for **all patients immunized** by IR Physicians.*	Increment Immunized
Return to the previous screen.	Cancel

1. Clicking **Preview Patients** will provide a list of patients included in the Reminder Recall Report. This information is presented on the screen and includes a hyperlink to each patient's demographic record.
2. Clicking **Increment Eligible** will reset the last notice date for all patients eligible for this reminder. The last notice date is viewable on

the patient's demographic record under the organization information section.

3. Increment last notice date for all patients immunized by your organization.

4. Click **Cancel** to return to the Reminder Request Status screen.

Reminder/Recall Output Options

The Reminder Request Output Options table, found on the Reminder Request Process Summary screen, allows you to choose how you would like to use the data from your query.

Reminder Letters

The letter output option allows you to generate a standard form letter for the parent/guardian for each patient returned on your query. The letter allows room at the top for your organization's letterhead. The body of the letter includes the patient's immunization history, recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number. To generate Reminder Letters:

1. Under the Additional Input column or the Letter section of the table, you have the option of entering:

Output	Description	Additional Input	
Reminder Letter	Standard Reminder Letter.	Report Name	
		Free Text	
		Phone #	

  a. If a Report Name is not indicated, the report will simply be named Reminder Letter on the Reminder Report Status screen.
  b. You may include a maximum of 400 characters in additional information in the Free Text field. Any information entered in this text box will be presented as the closing for each of the letters generated in your report.
  c. The telephone number is presented in the closing for each of the letters generated in your report.

2. Click **Reminder Letter**, which is a hyperlink.

3. Your report will be listed on the Reminder Request Status screen. The bottom table shows the name of the request, the date and time it was started and the status of the request.

  a. You have the option of moving to other portions of ALERT IIS or using other functions of your computer while you are waiting

for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.

b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.

4. Once the status displays as Ready and the report name becomes a hyperlink, your letters are ready to be viewed. Click the report name to view or print the letters in Adobe Reader®.

5. To print the letters, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.

6. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Dear Parent/Guardian of Letters Eligibility,

Our records indicate that Letters Eligibility has received the following immunizations:

Immunization Record		Tracking Schedule:	ACIP
Vaccine Group	Date Administered	Series	Vaccine
Influenza-seasnl	02/01/2013	1 of 2	Flu trivalent nasal
	03/01/2013	2 of 2	Flu trivalent nasal
	04/01/2013	Booster	Flu trivalent nasal
Smallpox	01/01/2010		Vaccinia (smallpox)
	02/01/2010		Vaccinia (smallpox)
	03/01/2010		Vaccinia (smallpox)
	04/01/2010		Vaccinia (smallpox)
	05/01/2010		Vaccinia (smallpox)
	06/01/2010		Vaccinia (smallpox)
Varicella	05/01/2013	1 of 2	Varicella
	06/01/2013	2 of 2	Varicella
	07/01/2013		Varicella

Our records also show that Letters Eligibility may be due for the following immunizations. If Letters received these or other immunizations from another health care provider, please call our office so that we can update Letters's record. Otherwise please take Letters to a health care provider to receive them.

Immunizations Due
DTaP, NOS
Flu NOS
HepA, NOS
HepB, NOS
MMR
Polio, NOS

The number for our office is: null

Reminder Card

The Reminder Card output option allows you to generate a standard reminder card for the parent/guardian for each patient returned on your query. The card allows room at the top for a greeting. The body of the card includes the patient's recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number. To generate Reminder Cards, follow these steps:

- Under the Additional Input column or the Letter section of the table, you have the option of entering the following information:
  - If a Report Name is not indicated, the report will simply be named Reminder Card on the Reminder Report Status screen
  - You may include a maximum of 400 characters in the Free Text field. Any information entered in this text box will be presented as the closing for each of the cards generated in your report.
  - The telephone number is presented in the closing for each of the cards generated in your report.

Dear Parent of Violet Georgia Dallman,

Our records show that Violet Georgia Dallman may be due for the following immunizations. If Violet received these or other immunizations from another health care provider, please call our office so that we can update Violet's record. Otherwise please schedule an appointment for Violet to receive them.

Immunizations Due
DTaP, NOS
HepA, NOS
HepB, NOS
Hib, NOS
MMR
PCV13
Polio, NOS
Varicella

Mailing Labels

The labels output option produces 30 labels per page on Avery Mailing Labels #5160. To generate mailing labels, follow these steps:

Mailing Labels	Avery Mailing Labels.	Report Name	

1. Click **Mailing Labels**, which is a hyperlink. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
2. You have the option of moving to other portions of ALERT IIS or using other functions of your computer while you are waiting for your labels to process. To return to check the progress of your request, click **Check Reminder Status** under Reports on the menu panel.
3. If you choose to stay at the Reminder Request Status screen while your request is processing, click **Refresh** periodically to check the status.
   a. Once the report name becomes a hyperlink, your labels are ready. Click the report name to view or print the labels in Adobe Reader®.
   b. To print the labels, click on the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
4. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Patient Query Listing

The Patient Query Listing displays contact information for those patients identified as being due/overdue in the Reminder/Recall output in a report format. This report lists every patient that was returned in the report query process. To generate a Patient Query Listing:

1. Click the **Patient Query Listing** hyperlink.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
   a. You have the option of moving to other portions of ALERT IIS or using other functions of your computer while you are waiting for your report to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.

b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.

3. Once the report name becomes a hyperlink, your report is ready. Click the report name to view or print the report in Adobe Reader®.

4. To print the report, click the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.

5. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Report run on: 01/20/2017 10:43	Patient Query Listing	Page 1 of 24
Patient Name (FML)	**Phone Number Address**	**City/State/Zip**

ADOLPH BLAINE GERALD HUBERT IRVIN   (214) 518-3819   BOLDERWOOD ARBORETUM   PORTLAND, OR 75243-
CHARLES DAVID EARL   BARSKA   x1111   ORNAMENTAL DRIVE   1111
KENNETH LLOYD MARTIN - 01/01/2010   Tracking Schedule: ACIP

Vaccine	Immunizations Due	Immunization Dates
HepA	01/01/2011	
HepB	01/01/2010	
Influenza-H5N1	01/01/2010	
Influenza-seasnl	08/01/2016	
MMR	01/01/2011	
Polio	03/01/2010	
Td/Tdap	01/01/2017	
Varicella	01/01/2011	

ACTIVE CLISTAT - 01/01/2010   506 ACTIVE STREET   ACTIVE, WI 43478
                                                                       Tracking Schedule: ACIP

Vaccine	Immunizations Due	Immunization Dates
HepA	01/01/2011	
HepB	01/01/2010	
Influenza-H5N1	01/01/2010	
Influenza-seasnl	08/01/2016	
MMR	01/01/2011	
Polio	03/01/2010	
Td/Tdap	01/01/2017	
Varicella	01/01/2011	

Immunization Series Key:	SP=Subpotent	NV=Not Valid

Extract Client Data

The Extract Client Data displays patient demographic information, immunization history, and recommendations for those patients identified as being due/overdue in the Reminder/Recall output in XML format. This report lists every patient that was returned in the report query process. To extract client data in XML format:

1. Click the **Extract Client Data** hyperlink.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.

Reminder Request Status

Started	Completed	Status	Patients	Target From	Target To
08/01/2011 05:58 AM	08/01/2011 06:01 AM	100 %	10	08/01/2011	08/01/2011
07/29/2011 07:11 AM	07/29/2011 07:12 AM	100 %	10	07/29/2011	07/29/2011
07/29/2011 07:06 AM	07/29/2011 07:07 AM	100 %	2	07/29/2011	07/29/2011
07/29/2011 07:06 AM	07/29/2011 07:07 AM	100 %	2		

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
Client XML	Client XML	08/01/2011 06:24 AM	08/01/2011 06:24 AM	08/01/2011 06:24 AM	Ready
Reminder Letter	Reminder Letter	08/01/2011 06:01 AM	08/01/2011 06:01 AM	08/01/2011 06:01 AM	Ready

Creating Custom Letters

In addition to the standard letter, ALERT IIS allows users to create and store up to three custom letters to be used for reminder/recall. To create a new custom letter, follow these steps:

1. Click **Manage Custom Letter** under Reports on the menu panel.

Manage custom letters

Long Test Nov 18 2010   Delete

Long Test Oct 29 2010   Delete

New Custom Letter

2. Click the **New Custom Letter** hyperlink.
3. At the Create New Custom Letter screen, enter the following:
   a. Top Margin: Choose the number of blank lines you would like at the top of the letter from the drop down list provided. These blank spaces will leave room to print the letters on your office letterhead.
   b. Include Patient Address:
      i. Check the box to include the patient's address at the top of the letter.
   c. To include a name with the patient address, choose from the drop down list one of the following:
      i. (no name) - default
      i. Patient name
      ii. To the parent/guardian of patient name
   b. Salutation: Enter a greeting, and then choose a name option from the drop down list provided.

i. If name is chosen, the name of the patient will show up after the salutation.

ii. If responsible person is chosen, the letter will read <salutation> Parent/Guardian of <patient name>

4. Paragraph 1:

   a. In the field marked First Part, enter desired text.

   b. If you do not wish to include a name, you may enter all of the first paragraph text in the field marked First Part and select no name from the name drop down list.

   c. If you wish to include a name within the paragraph, enter text up to the mention of the name ending with a single space. Next, choose the name you would like to appear within the paragraph from the drop down list (either parent/guardian, patient name or no name).

   d. In the field marked Second Part, continue to enter the rest of the text.

   e. Immunization History: Check the box to include the patient's immunization history in the letter.

   f. The maximum amount of allowed characters in this field is 4,000.

5. Paragraph 2: You may enter more text in this field.

   a. Immunization recommendations: Check this box to include the immunization forecast for the patient in the letter.

   b. The maximum amount of allowed characters in this field is 4,000.

6. Paragraph 3: You may enter text in this field.

   a. Closing: Enter a closing word or statement in this field. If you wish to include your provider, organization's name and/or telephone number after the closing, check the appropriate boxes.

   b. Name and Save the Custom Letter: Enter a name for the letter in the field provided. When the letter is complete, click on Save.

c. The maximum amount of allowed characters in this field is 4,000.

Top Margin

Number of blank lines at the top of the letter: 3 ▼

Patient Address

☐ Include patient address

Salutation

Enter a salutation for the letter: [   ]

Include a name at the end of the salutation: (no name) ▼

Paragraph 1

First Part

[   ]

Include a name between the first and second parts of this paragraph: (no name) ▼

Second Part

[   ]

Immunization History

☐ Include immunization history

Paragraph 2

[   ]

Immunization Recommendations

☐ Include immunization recommendations

Paragraph 3

[   ]

Closing

Enter a closing for the letter: [   ]

☐ Include provider organization name in the closing
☐ Include provider organization phone number in the closing

Name and save the custom letter

Name the custom letter [   ]

[Save]   [Cancel]

■■■■■■■

Note: Once you have saved the custom letter, click on check reminder status in the left hand menu bar. Then select the reminder report you want to use to generate your custom letter.

■■■■■■■

Generating Custom Letters

The custom letter output option allows you to generate a customized letter for each patient returned on your query. To create a new custom letter, refer to the Creating Custom Letters section of this chapter. To generate a custom letter from the Reminder Request Process Summary screen:

1. Every time you generate a custom letter, you will want to give the report a unique name. This name is different from the custom letter name. You will want to name the report prior to clicking on the custom letter hyperlink.
2. Click the link with the name of the custom letter. The letter will begin generating immediately.

Patient Query Listing	A list of patients based on the report criteria.	Report Name	
Extract Client Data	Extract client data in XML format.	Report Name	
Long Test Nov 18 2010	Custom Letter.	Report Name	
Long Test Oct 29 2010	Custom Letter.	Report Name	

3. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
    a. You have the option of moving to other portions of ALERT IIS or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
    b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
4. Once the report name becomes a hyperlink, your letters are ready. Click on the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click on the printer icon on the Adobe® toolbar. Click on OK in the Print dialog box.
6. To print additional output, click on the back button on your browser. At the Reminder Request Status screen, click on the reminder request hyperlink (top table) to return to the Reminder Request Process

Summary screen.

To Parent/Guardian of Bishal Update Patient
4822
9030 MARKVILLE DR.
355 LEDGE DAWN DR.
PORTLAND, OR 75243

Dear Parent/Guardian,

Immunizations are an important part of keeping families and communities healthy. Vaccines provide protection from diseases that affect children and adults in Oregon. ALERT IIS is a system designed to keep all immunization records in one place. The record below shows vaccines that have been submitted by healthcare providers for your child. Based on these records, Bishal Update Patient may need the additional immunizations listed in the Immunizations Due box at the end of this letter.

Immunization Record		Tracking Schedule:	ACIP
Vaccine Group	Date Administered	Series	Vaccine
DTP/aP	01/01/2010	Not Valid	Tdap
	02/01/2010	Not Valid	Tdap
	03/01/2010	Not Valid	Tdap
	04/01/2010	Not Valid	Tdap
	05/01/2010	Not Valid	Tdap
	07/01/2010	Not Valid	Tdap
	04/13/2016	1 of 5	DTaP-HepB-IPV
HepB	04/13/2016	1 of 3	DTaP-HepB-IPV
HPV	10/14/2014		HPV, Bivalent
Ig	01/01/2010		RIg
MMR	01/01/2010	Not Valid	MMR
Polio	04/13/2016	1 of 4	DTaP-HepB-IPV
Smallpox	07/24/2013		Vaccinia (smallpox)
	07/24/2013		Vaccinia (smallpox)
Varicella	01/10/2010	Not Valid	Varicella

Vaccine Eligibility

The Vaccines for Children (VFC) Report details the number of patients that were vaccinated by your organization for each Vaccine Eligibility type for a specified date range. To generate a VFC Report:

1. Click **Vaccine Eligibility** under the Reports section of the menu panel.

2. Select your organization name from the drop-down list.
3. Enter a From date under the Report Date Range using the MM/DD/YYYY format.
4. Enter a To date under the Report Date Range using the MM/DD/YYYY format.
5. Choose a type of VFC Report to run. You have two choices:
   a. The Age Group report displays a summary of patients by vaccine eligibility and four specific age ranges: < 1 year of age, 1-6 years of age, 7-18 years of age and 19 years and older.
   b. The Vaccine Group report displays a summary of doses by vaccine eligibility and vaccine groups.
6. Click the **Generate Report** button. The reports drop into a processing queue:

7. Click Refresh until the statuses are 100%; then click on the underlined hyperlink, and you will be presented with an adobe file which contains your report. From here you can print the document; then close the document window to return to the results screen.

Understanding the Vaccine Eligibility Report by Vaccine Group
The following section explains the rows and columns within the Vaccine Edibility Report by Vaccine Group. The report only displays vaccines administered by your organization.

Vaccines for Children
For Dates Between 02/07/2010 and 06/07/2016

Report run on: 06/07/2016 7:50 AM

Organization: IR PHYSICIANS - IRPHVF

Key: Vaccine Eligibility Code		
M - Medicaid, OHP	U - Underinsured, not FQHC	B - Billable/Not Eligible
N - No Insurance	C - Insured, Co-pay Unaffordable	L - Locally Owned
A - Am. Indian/AK Native	O - Other State Supplied	S - Special Projects
F - Underinsured, FQHC	R - Unknown Insurance Status	G - IG only
		NS - Not Specified

Vaccine	M	N	A	F	U	C	O	R	B	L	S	G	NS	Total
Adeno	1	0	0	0	0	0	0	0	0	0	0	0	1	2
Anthrax	0	0	0	0	0	0	0	0	0	0	0	0	3	3
BCG	3	0	1	0	0	0	0	0	0	0	0	0	0	4
Cholera	0	3	0	0	0	0	0	0	0	0	0	0	0	3
DTP/aP	12	1	1	0	0	2	1	0	8	0	3	0	34	62
DTP/aP-HepB-Polio	2	1	1	0	0	0	0	0	2	0	0	0	0	6
DTP/aP-Hib-Polio	2	1	0	0	0	0	0	0	7	0	0	0	6	16
DTP/aP-Polio	0	0	0	0	0	0	0	0	2	0	0	0	0	2
DTP/aP-Polio-Hib-HepB	0	0	0	0	0	0	0	0	0	0	0	0	1	1
Encephalitis	0	0	0	0	0	0	2	0	0	0	0	0	1	3
HepA	4	0	1	0	0	0	0	0	11	0	2	0	7	25
HepA-HepB	0	0	0	0	0	0	0	0	1	0	0	0	0	1
HepB	6	1	2	2	0	0	0	0	63	0	2	0	14	90
HepB-Hib	0	0	0	0	0	0	0	0	1	0	0	0	0	1

The key at the top of the report provides a listing of each vaccine eligibility code and its description. This report may show codes that are not available to your clinic. Codes are specific to whether your clinic is public or private and whether you have a federal designation. No provider will be able to use all codes listed.

The columns on the report break down the vaccines administered by vaccine eligibility code.

Column	Description
Vaccine	Lists the vaccines that were used by your organization during the date range entered for the report
M	Medicaid, Oregon Health Plan
N	No Insurance
A	American Indian/ Alaskan Native
F	Underinsured Federal Qualified Health Center (FQHC)
U	Underinsured, not FQHC
C	Insured, Co-pay Unaffordable
O	Other State Supplied
R	Unknown Insurance Status
B	Billable/Not Eligible
L	Locally Owned
S	Special Projects
G	IG Only
NS	Not Specified
Total	The total count of immunizations provided for the type of vaccine administered

Understanding the Vaccine Eligibility Report by Age Group

The following section explains the rows and columns within the Vaccine Eligibility report by Age Group. The report only displays patients who have received vaccines administered by your organization.

Vaccines for Children by Provider
For Dates Between 01/01/2010 and 01/01/2011

Report run on: 02/09/2011 10:40 AM

Page 1

IR Physicians - Z90090

Key: Vaccine Eligibility Code		
M - Medicaid, OHP	U - Underinsured, not FQHC	B - Billable/Not Eligible
N - No Insurance	C - Insured, Co-pay Unaffordable	L - Locally Owned
A - Am. Indian/AK Native	O - Other State Supplied	S - Special Projects
F - Underinsured, FQHC	R - Unknown Insurance Status	G - IG only
		NS - Not Specified

(Age)	M	N	A	F	U	C	O	R	B	L	S	G	NS	Total
<1	2	1	9	0	0	0	0	0	3	1	1	1	6	24
1-6	1	3	5	1	0	4	0	1	0	1	0	2	2	20
7-18	3	1	1	0	0	1	0	0	0	0	0	0	2	8
19+	1	1	0	0	0	0	0	1	4	0	1	0	2	10
Total	7	6	15	1	0	5	0	2	7	2	2	3	12	62

The key at the top of the report provides a listing of each vaccine eligibility code and its description.

The rows on the report break down the count of distinct patients given immunizations by age in years. For example, patient who receives a vaccination when he or she is 6 years and 11 months old will be included in the 1-6 age group.

Row	Description
< 1	Patients who were under 1 year of age at the time a dose was administered
1-6	Patients who were 1 through 6 years of age at the time a dose was administered
7-18	Patients who were 7 through 18 years of age at the time a dose was administered
19+	Patients who were 19 years of age or older at the time a dose was administered

Each column on the report counts the number of distinct patients who have received immunizations associated with a vaccine eligibility category within the specified date range. For example, a single patient who received 3 Medicaid doses would contribute only +1 to the total column.

Column	Description

M – Medicated, OHP	The immunization indicates Medicaid, Oregon Health Plan.
N – No Insurance	The immunization indicates No Insurance
A - American Indian	The immunization indicates American Indian/ Alaskan Native.
F - Underinsured, FQHC	The immunization indicates Underinsured, FQHC.
U - Underinsured, not FQHC	The immunization indicates the vaccine eligibility Underinsured, not FQHC
C – Insured, Co-pay Unaffordable	The immunization indicates the vaccine eligibility Insured, Co-pay Unaffordable
O – Other State Supplied	The immunization indicates the vaccine eligibility Other State Supplied`
R – Unknown Insurance Status	The immunization indicates the vaccine eligibility Unknown Insurance Status
B – Billable/Not Eligible	The immunization indicates the vaccine eligibility Billable/Not Eligible
L – Locally Owned	The immunization indicates the vaccine eligibility Locally Owned
S – Special Projects	The immunization indicates the vaccine eligibility Special Projects
G – IG Only	The immunization indicates the vaccine eligibility IG Only
NS: Not Specified	The immunization does not indicate a vaccine eligibility
Total	The total count of patients given immunizations for each age group category

Billing Report

Selecting the Billing Report will allow you to create a report where you can preview your quarterly billable report and check to ensure that your coding is correct before the final bill is prepared by VFC staff.   The report displays those immunizations administered during the specified time period which have been coded with an eligibility code of "B-billable/not eligible", indicating that the dose is reimbursable either by an insurance company or by the patient. To generate a billing report:

1. Select **Billing Report Request** from the side Reports menu and you will be presented with the following selection screen:

Billing Report Request

Select Report Time Period

○ Quarter ▼ Year 2012 ▼

○ Begin Month ▼ Year ▼ End Month ▼ Year ▼

Select Billing Organization

◉ All Organization Statewide

○ All Organization Statewide Rollup

○ All Organization Statewide Rollup and Individual Breakout

○ Use Single Organization ▼ ☐ Include Satelite Organizations

Enter Memo Presentation Information...

VFC Manager: [   ] Admin.Specialist: [   ]

Select Included Reports

☐ Include Memo

☐ Include Summary

☐ Include Detail

[Generate] [Cancel]

2. Select the quarter and year you wish to generate the billing report for, or alternately, enter the begin month and year and end month and year from the dropdowns provided.

3. Select the billing organization by clicking on the drop down menu and selecting your organization. If you have satellite organizations and would like their information included in your report, check the appropriate box. If you would like to create a copy of the billing memo, enter the names of the VFC Manager and the Administrative Specialist to be included on the generated memo.

4. Select Included Reports: Check the boxes indicating which report types are requested – Memo, Summary, and/or Detail.

5. Click **Generate.** The reports drop into a processing queue:

Billing Reports Status					Refresh	Cancel
Report Name	Started	Completed	Status	Period	Organization	
DETAIL	2012-04-16 13:03:06.0		30%	Quarter 4 2011	AMJEN PRIVATE VFC FQHC UI	
SUMMARY	2012-04-16 13:03:06.0		15%	Quarter 4 2011	AMJEN PRIVATE VFC FQHC UI	
MEMO	2012-04-16 13:03:05.0		15%	Quarter 4 2011	AMJEN PRIVATE VFC FQHC UI	
SUMMARY	2012-04-12 07:28:48.0	2012-04-12 07:39:13.0	100%	Quarter 1 2012	All	
SUMMARY	2012-04-05 15:37:33.0	2012-04-05 15:38:08.0	100%	Quarter 1 2012	IR Physicians	

6. Click Refresh until the statuses are Complete; then click on the underlined hyperlink, and you will be presented with an adobe file which contains your report. From here you can print the document; then close the document window to return to the results screen.

Sample Memo Billing Report

Sample Summary Billing Report

04/16/2012   **Billable Vaccination Summary**
                              Quarter:10/01/2011-12/31/2011

Organization: AMJEN PRIVATE VFC FQHC UI
VFC PIN: A0500
Satellite:

Vaccine/Brand	Doses Billed	Price Per Vaccination	Total Amount
HPV, NOS-HPV, NOS	1.0	$ 150.00	$ 150.00
HPV, NOS-HPV, NOS Totals			$ 150.00
AMJEN PRIVATE VFC FQHC UI	1.0		$ 150.00
Agency Totals:	1.0		$ 150.00

Sample Detail Billing Report

Billable Vaccination Detail Listing

Quarter: 10/01/2011 - 12/31/2011

Organization: AMJEN PRIVATE VFC FQHC UI
Organization VFC PIN: A0500
Satellite: N/A
Satellite VFC PIN: N/A

Vaccine: HPV, NOS   Brand: HPV, NOS   Price: $ 150.00

State ID	Vaccination Date	Client Name	Date of Birth
7177625	10/11/2011	KITTRIDGE, LILLITH JANE	08/10/1998

Total HPV, NOS Vaccinations: 1.0   Cost: $ 150.00
===
Total HPV, NOS Vaccinations: 1.0   Cost: $ 150.00
===
Total HPV, NOS Vaccinations: 1.0   Cost: $ 150.00

Total AMJEN PRIVATE VFC FQHC UI Vaccinations: 1.0   Cost: $ 150.00

Agency Total Vaccinations: 1.0   Cost: $ 150.00

After reviewing the reports, if you find patients with doses that need to be recorded, you can edit the vaccine eligibility code through the user interface by bringing up the patient's immunization record and editing the appropriate dose. If you submit immunization information through an electronic interface, you still need to update immunization eligibility codes through the user interface.

Provider Report

Provider reports are available to designated user roles only. If you feel as though you need access to one of the following reports please contact the ALERT IIS Help Desk. Selecting the Provider Report will allow you to further specify up to 4 different Provider level reports, which provide information about aggregate transactions entered into ALERT IIS for specified time periods. These reports can be generated for specific organizations, or for organizations including their satellites. To generate a Provider Report:

1. Click **Provider Report** under the Reports section of the menu panel.

Provider Report Criteria

Organization(s): -- Please Select Organization ▾   [Generate Report]

Report Date Range:

From 01/01/2012   To 03/26/2012

Report: ☐ Include Satellite Organizations

⦿ Provider Participation Report

○ Provider Data Entry Report

○ Data Entry Compliance Report

○ Late Data Entry Detail Report

2. Select the organization name from the drop-down list.
3. Enter a From date under the Report Date Range using the MM/DD/YYYY format. (The default is provided is the first day of the current year, as in a year-to-date report. However you can change the From date by entering a different date or selecting it from the calendar icon).
4. Enter a To date under the Report Date Range using the MM/DD/YYYY format. (The default is provided as the current date, however you can change the To date by entering a different date or selecting it from the calendar icon).
5. Indicate if you want to also include transactions from your satellite organizations by clicking on the checkbox "Include Satellite Organizations". If you wish to report only on the selected organization, leave this checkbox blank.
6. Choose a type of Provider Report to run. You have four choices:
    a. Provider Participation Report
    b. Provider Data Entry Report
    c. Data Entry Compliance Report
    d. Late Data Entry Detail Report
7. Click the **Generate Report** button.
8. The report request drops into a processing queue, in order to update the % complete click on the refresh button, when status indicates "ready" you can click on the underlined hyperlink to view the report.

Provider Report Status   [Refresh]
                                                                  [Cancel]

Name	Started	Completed	Status	Organization	From Date	To Date
Provider_Participation_Report	03/26/2012 09:55 AM	03/26/2012 09:55 AM	Ready	IR Physicians	01/01/2012	03/26/2012

9. The form displays in Adobe® Reader. To print the report, click on the printer icon on the Adobe® toolbar.

10. Click the **OK** button in the Print dialog box. To return to the Provider Report Status screen, click the Back button on your browser.

Understanding the Provider Participation Report

1. *There are 5 sections to the Provider participation report, first is the Header which displays information about the requesting organization:*

IR Physicians - Participation Report		Report Generated:	03/26/2012
Street Address	200 PHYS NOTHING, OR 00101	Alert Id	IRPH
		VFC Pin	Z90090
		County	Benton
Mailing Address	200 MAIL NOTHING, AK 00101	Source Type	Primary
		Submission Type	Bar Codes
		Organization Type	IPA/Vendor
Phone	(608) 221-4746	Last UI Submission	03/23/2012
		Last DX Submission	03/16/2012

2. The second section displays a graph of patients by age group (across the top), according to their vaccine eligibility code (displayed on each line); a count of patients who have received an immunization from this organization within the specified date period:

Patients Reported by Age Group:	01/01/2012 - 03/26/2012				
Vaccine Eligibility Code	<1 Yr	1-6 Yrs	7-18 Yrs	19+ Yrs	**Subtotal
M - Medicaid, OHP	1	0	0	0	1
N - No Insurance					0
A - Am.Indian/AK Native	0	5	0	0	5
F - Underinsured, FQHC					0
U - Underinsured, not FQHC					0
C - Insured, Co-pay Unaffordable					0
O - Other State Eligible					0
S - Special Projects					0
R - Unknown Insurance Status					0
B - Billable/Not Eligible	0	2	1	0	3
L - Locally Owned					0
Not specified					0
H - History					0
G - IG only					0
				Totals:	**9
				Unduplicated Count:	9

**Patients will be counted multiple times if they age from one age category to another during the chosen time period, so the subtotal may differ from the unduplicated count.

3. The third section displays a quarterly breakdown of the distinct number of patients who received immunizations administered by the selected organization:

Quarterly Submission Breakdown of Patients Reported:

Year	Qtr 1	Qtr 2	Qtr 3	Qtr 4	
2012	9				
	Unduplicated Annual Count:				9
2011	184	121	102	62	
	Unduplicated Annual Count:				300
2010	624	549	589	507	
	Unduplicated Annual Count:				1,497
2009	620	615	620	577	
	Unduplicated Annual Count:				1,633
2008	622	476	459	533	
	Unduplicated Annual Count:				1,392
2007	1,094	913	808	724	
	Unduplicated Annual Count:				1,765

4. The fourth section displays by quarter the number of patient searches performed by the specified organization:

Quarterly Patient Searches for this Clinic:

Year	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Total
2012	88,841				88,841
2011	414,45	181,885	184,566	34,319	815,224
2010	0	0	12,663	1,967,12	1,979,78

5. The fifth section displays the number of patient searches, annually, for the selected organization, broken down by clinic user:

Annual Patient Searches By Clinic User:

WebUser Name	Phone	2012	2011	2010	2009	2008	2007	Total
Meaza Bikes		3	11					14
Laura Cotting		0	1					1
Dan Beghin		1	4					5
Michelle Munson		167	94					261
Sushma Labh		1	0					1
Eric Schuh		185	46	0				231

Understanding the Provider Data Entry Report

The Provider Data Entry report displays a count of the various transactions entered into the system during the specified time period:

User Interface	
Transactions	Count
New Patients Entered	38
Overrides Created	23
Overrides Merged	11
Overrides Determined Unique	1
Overrides Pending	18

Data Exchange	
Transactions	Count
New Patients Entered	55
Pending Patients Created	14
Pending Patients Merged	21
Pending Patients Determined Unique	0
Pending Patients Review	14

Understanding the Data Entry Compliance Report

The Data Entry Compliance Report displays information about when the immunization was entered into the system versus the administration date (for the selected time period). It is grouped to highlight those immunizations that were entered past the standard 14 days after administration.

Data Entry Compliance Report

Organization: IR Physicians
AL #: IRPH
Report Date: 03/26/2012

The Best-practice for timely data entry is within 14 days of the date of administration of the vaccine.

Quarter	<= 1 Day		> 1 day - <= 7 days		>7 days - <= 14 days		Total Meeting 14-day submission guideline		>14 days - <= 30 days		>30 days		Total Past 14-day submission guideline		Total
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count
Quarter 2 2010	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0
Quarter 3 2010	6	27.27%	0	0%	0	0%	6	27.27%	0	0%	16	72.73%	16	72.73%	22
Quarter 4 2010	3	0.76%	0	0%	2	0.51%	5	1.27%	6	1.52%	384	97.22%	390	98.73%	395
Quarter 1 2011	16	9.58%	2	1.2%	1	0.6%	19	11.38%	0	0%	148	88.62%	148	88.62%	167
Quarter 2 2011	11	6.55%	0	0%	1	0.6%	12	7.14%	0	0%	156	92.86%	156	92.86%	168
Quarter 3 2011	19	9.84%	0	0%	0	0%	19	9.84%	2	1.04%	172	89.12%	174	90.16%	193
Quarter 4 2011	4	12.9%	0	0%	1	3.23%	5	16.13%	3	9.68%	23	74.19%	26	83.87%	31
Quarter 1 2012	16	14.29%	0	0%	1	0.89%	17	15.18%	1	0.89%	94	83.93%	95	84.82%	112

Last Eight Complete Quarters:
Days from Administration to Entry/Submission to Alert IIS:

Last Two Complete Years:
Days from Administration to Entry/Submission to Alert IIS:

Complete Year	<= 1 Day		> 1 day - <= 7 days		>7 days - <= 14 days		Total Meeting 14-day submission guideline		>14 days - <= 30 days		>30 days		Total Past 14-day submission guideline		Total
	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count	%	Count
Quarter 2 2010 - Quarter 1 2011	25	4.28%	2	0.34%	3	0.51%	30	5.14%	6	1.03%	548	93.84%	554	94.86%	584
Quarter 2 2011 - Quarter 1 2012	50	9.92%	0	0%	3	0.6%	53	10.52%	6	1.19%	445	88.29%	451	89.48%	504

Understanding the Late Data Entry Detail Report

The Late Data Entry detail report gives additional information about the immunizations administered during the selected time period, and compares that to when they were entered into ALERT. The report is group by clinician's name:

Late Data Entry Detail Report

Organization: IR Physicians
AL #: IRPH
Report Date: 03/26/2012
Date Range: 01/01/2012 to 03/26/2012

Patient ID	Date of Birth	Vaccine	Date Administered	Date Entered	Days between administration and submission
Data Entered By : Michelle Munson					
7138793	01/10/1998	Influenza, seasonal, injectable pfree	01/09/2012	01/10/2012	1
Data Entered By : Eric Schuh					
7105051	01/01/2010	HPV, Bivalent	03/09/2012	03/09/2012	0
7040890	01/01/2010	Hib-OMP	01/09/2012	01/09/2012	0
7040890	01/01/2010	HepA, NOS	01/09/2012	01/09/2012	0
7066111	01/01/2010	HepA, NOS	01/09/2012	01/09/2012	0
7105051	01/01/2010	Vaccinia (smallpox)	03/05/2012	03/05/2012	0
7040890	01/01/2010	HPV, NOS	01/09/2012	01/09/2012	0
7040890	01/01/2010	Influenza, seasonal, injectable pfree	01/04/2012	01/04/2012	0
7066111	01/01/2010	Hib-OMP	01/09/2012	01/09/2012	0
7066111	01/01/2010	HPV, NOS	01/09/2012	01/09/2012	0
7139771	01/01/2010	Vaccinia (smallpox)	01/06/2012	01/06/2012	0
Data Entered By : Heather Worachek					
7177773	01/01/2010	MMR	03/20/2012	03/20/2012	0
Data Entered By : Li Zhang					
7140936	01/01/2010	HepA-Ped 2 Dose	01/01/2012	02/03/2012	33
7113891	01/01/2010	Cholera-Inject	03/08/2012	03/08/2012	0
7113891	01/01/2010	Varicella	01/17/2012	01/17/2012	0
7113891	01/01/2010	HepA, NOS	01/04/2012	01/04/2012	0

Vaccine Accountability Report

The Vaccine Accountability Report provides information about inventory transactions entered into ALERT IIS for selected quarterly time periods. The report is available to designated user roles only. If you feel as though you need access to the Accountability Report please contact the ALERT IIS Help Desk. The Vaccine Accountability Report can be generated for a single organization, multiple organizations, or All VFC organizations (available to state-level user roles only). When the Vaccine Accountability Report is generated for a single organization, both a Summary report and a Detail report will be created. When the Vaccine Accountability Report is generated for multiple organizations or All VFC organizations, only a Summary report will be created. To generate a Vaccine Accountability Report:

1. Click **Accountability Report Request** under the Reports section of the menu panel.

Vaccine Accountability Report Request

Begin Date [▼] End Date [▼]

Select Accountability for Organization
- ○ VFC Clinics Statewide
- ○ Select Individual Organization

Organization Name

| PIVOT HEALTH CLINIC |
| MCNARY HEIGHTS ELEMENTARY SCHOOL |
| WALGREENS PHARMACY 07119 |
| EAST GRESHAM ELEMENTARY SCHOOL |
| KNOWLEDGE BEGINNINGS HILLSBORO |

Add >
Add All >>
< Remove
<< Remove All

Selected Organizations

Select Type of Vaccine:
○ State Supplied ○ Privately Purchased ○ Both

If Individual Organization option is chosen and only one Org is selected, in addition to the Summary Report that shows Accountability by Vaccine Group, a Detail Report will be available that shows accountability by individual lot numbers, sorted by Vaccine Group.

Report Name: [_____]

Generate   Cancel

2. Select the beginning quarter/year from the Begin Date drop down list. (The options provided appear as "Quarter [#], [YYYY]", for instance "Quarter 4, 2013". The IIS translates the selected quarter to the **FIRST** date of that quarter, which is October 1, 2013.)
3. Select the ending quarter/year from the End Date drop down list. (The options provided appear as "Quarter [#], [YYYY]", for instance "Quarter 4, 2013". The IIS translates the selected quarter to the **LAST** date of that quarter, which is December 31, 2013.)

■■■■■□□□

Note: It is acceptable to select the same quarter option in the Begin Date and End Date drop down lists. For instance, if Quarter 4, 2013 is selected for both the Begin Date and End Date, the report period will be October 1 - December 31, 2013.

Quarter breakdown:
>	Quarter 1: January 1 – March 31
>	Quarter 2: April 1 – June 30
>	Quarter 3: July 1 – September 30

Quarter 4: October 1 – December 31

4. Select the organization options available to you (not all options are available to all user roles).
   a. The "Select Individual Organization" option may be selected in order to run a Vaccine Accountability Report for one or more selected organizations.
      i. Most user roles will see their assigned IIS organization(s) displayed in the Organization Name list box and may select one or more organizations for the report.
      ii. If you are assigned to one organization and are not a state-level user, your organization will automatically be selected for you.
      iii. State-level users have all IIS organizations with a VFC status of Active or Suspended displayed in the Organization Name list box and may select one or more organizations for the report.
   b. For state-level user roles only, the "VFC Clinics Statewide" option may be selected in order to run a Vaccine Accountability Report for all clinics that have a VFC Status of Active or Suspended.
5. Choose the type of vaccine you would like to include in your Vaccine Accountability Report. Options include "State-Supplied", "Privately Purchased", or "Both."
6. Enter the report name in the Report Name text box. Entering a report name is optional. If no report name is entered, ALERT IIS will automatically assign a report name as shown below:
   a. One organization Detail report: "[Organization Name]_ Detail.xls"
   b. One organization Summary report: "[Organization Name].xls"
   c. Multiple Organization Summary report: "Multiple_Orgs.xls"
   d. VFC Clinics Statewide Summary report: "Statewide.xls"
7. Click the **Generate** button.
8. The report request drops into a processing queue. In order to update the Status, click on the refresh button. When status indicates "100%" you can click on the underlined hyperlink(s) to view the report.

Accountability Report Status							Refresh	Cancel
Report Name	VFC PIN	Vaccine Type	Begin Date	End Date	Status	Summary Report	Detail Report	
Statewide	Z90090	Both	Quarter 1, 2014	Quarter 2, 2014	100%	Statewide.xls		
Multiple Orgs	Z90090	Both	Quarter 1, 2014	Quarter 2, 2014	100%	Multiple Orgs.xls		
IR Physicians	Z90090	Both	Quarter 1, 2014	Quarter 2, 2014	100%	IR Physicians.xls	IR Physicians_Detail.xls	

9. The reports are in the '.xls' spreadsheet format, so you may be prompted to open or save the file. Choose from the options presented: Open, Save, or Cancel. The file will open in the program on your computer that is set to open '.xls' files, such as Microsoft Excel.

10. To print the report, click on the printer icon on the Microsoft Excel toolbar or other program that has opened the file.

11. Click the **Print** button in the Print dialog box.

Vaccine Accountability – Detail Report

1. The Detail Report contains accountability data grouped by Vaccine Group and Lot Number.

Oregon Immunization Program			Vaccine Accountability Report - REX'S TEST CLINIC-PUBLIC							Oregon Vaccines for Children

Org Code: RL1111   VFC PIN: R11111

Report timeframe: Quarter 1, 2014 - Quarter 2, 2014   Report date: 04/27/2014   Funding Source: Both

This report only reflects data reported to ALERT IIS during the report timeframe and does not include influenza vaccine.

Detailed Accountability Data by Vaccine Group and Lot

Vaccine Group	Lot Number	+ Starting Inventory	+ Doses Received	- Doses Reported	- Doses Expired	- Doses Spoiled	- Doses Wasted	- Doses Transferred Out	+ Ending Inventory	Accounted for Doses	Accounted for %
HepA	adult 1	50	0	0	0	0	0	0	30	30	60.00%
HepA	**ALL**	**50**	**0**	**0**	**0**	**0**	**0**	**0**	**30**	**30**	**60.00%**
HepA-HepB	dupe-test	0	13	0	0	0	0	0	13	13	100.00%
HepA-HepB	**ALL**	**0**	**13**	**0**	**0**	**0**	**0**	**0**	**13**	**13**	**100.00%**
HepB	123x1	50	0	-1	0	0	0	-9	39	49	98.00%
HepB	**ALL**	**50**	**0**	**-1**	**0**	**0**	**0**	**-9**	**39**	**49**	**98.00%**
HepB-Hib	Test6	0	7	0	0	0	0	0	7	7	100.00%
HepB-Hib	**ALL**	**0**	**7**	**0**	**0**	**0**	**0**	**0**	**7**	**7**	**100.00%**
Hib	Privatetest	87	0	0	0	-17	0	0	70	87	100.00%
Hib	**ALL**	**87**	**0**	**0**	**0**	**-17**	**0**	**0**	**70**	**87**	**100.00%**
Meningo	LOT1098120	4	0	-1	0	0	0	-3	0	4	100.00%
Meningo	LOT1287216	25	0	0	0	0	0	-5	20	25	100.00%
Meningo	**ALL**	**29**	**0**	**-1**	**0**	**0**	**0**	**-8**	**20**	**29**	**100.00%**
Polio	LOT1076110	28	0	-3	0	0	-20	0	2	25	89.29%
Polio	**ALL**	**28**	**0**	**-3**	**0**	**0**	**-20**	**0**	**2**	**25**	**89.29%**
Td/Tdap	123521	89	0	-1	0	0	0	0	79	80	89.89%

Vaccine Accountability – Summary Report

1. The Summary Report contains accountability data grouped by Vaccine Group, with all lot numbers combined.

Vaccine Accountability Report - REX'S TEST CLINIC-PUBLIC

Org Code: RL1111	VFC PIN: R11111

Report timeframe: Quarter 1, 2014 - Quarter 2, 2014	Report date: 04/27/2014	Vaccine Funding Source: Both

This report only reflects data reported to ALERT IIS during the report timeframe and does not include influenza vaccine.

Accountability Data By Vaccine Group

VFC PIN	Organization Name	County	Vaccine Group	+ Starting Inventory	+ Doses Received	- Doses Reported	- Doses Expired	- Doses Spoiled	- Doses Wasted	- Doses Transferred Out	+ Ending Inventory	Accounted for Doses	Accounted for %
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	DTP/aP	30	0	0	0	0	-15	0	15	30	100.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	HepA	50	0	0	0	0	0	0	30	30	60.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	HepA-HepB	0	13	0	0	0	0	0	13	13	100.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	HepB	50	0	-1	0	0	0	-9	39	49	98.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	HepB-Hib	0	7	0	0	0	0	0	7	7	100.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	Hib	87	0	0	0	-17	0	0	70	87	100.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	HPV	200	0	0	0	-100	0	0	100	200	100.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	Meningo	29	0	-1	0	0	0	-8	20	29	100.00%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	Polio	28	0	-3	0	0	-20	0	2	25	89.29%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	Td/Tdap	89	20	-1	0	0	0	0	99	100	91.74%
R11111	REX'S TEST CLINIC-PUBLIC	Tillamook	Varicella	79	0	-1	0	-8	-10	0	49	68	86.08%
Total		_	ALL	642	40	-7	0	-125	-45	-17	444	638	93.55%

Understanding Vaccine Accountability Report

Columns and Calculations:

+ Starting Inventory	+ Doses Received	- Doses Reported	- Doses Expired	- Doses Spoiled	- Doses Wasted	- Doses Transferred Out	+ Ending Inventory	Accounted for Doses	Accounted for %
1	2	3	4	5	6	7	8	9	10

The following inventory transactions are "counted" in each of the above categories of the Vaccine Accountability Report. See p. 70, *Table 1: Reasons for adding or subtracting inventory* for more details on these transaction types.

1. Inventory units on-hand at begin date of report (active non-expired)
2. Doses Received, transfers in, and '+' error correction
3. Immunizations Given less Immunizations Deleted (must be recorded in the IIS with a valid eligibility code)
4. Expiration reported by Provider (automatic inventory transaction)
5. Spoilage reported by Provider, Failure to store properly on receipt by Provider, Refrigeration failure report by Provider

6. Other not usable by Provider, doses recalled, and '- 'error correction
7. Doses Transferred Out
8. Inventory units on hand at end date of report (active, non-expired): per system
9. Accounted for Doses = |(3+4+5+6+7)|+8
10. Accounted for Doses / Total vaccine doses |(3+4+5+6+7)|+8 / 1+2
     i.e., total accounted for transactions + ending inventory / total theoretical doses available
11. Unaccounted for includes sum of negative values for (-) doses administered transaction (doses that were manually subtracted, not deducted via inventory modification), (-) Lost or unaccounted for in Provider Inventory, (-) doses recorded in the IIS without a valid eligibility code,and (+) doses deleted in the IIS without a valid eligibility code for the org

Detailed List of Inventory Transactions

The code is what is displayed in the Show Transactions report in ALERT IIS.

	CODE	-/+	DESCRIPTION	SOURCE OF TRANSACTION	SOURCE TYPE
A	REC	+	Receipt of Inventory	Edit Inventory reason pick list	manual
B	REC	+	Receipt of Inventory	Add inventory is saved, Order/transfer Received	automated
C	RET	+	Doses Returned	Rejected transfer that is restocked in inventory	automated
D	RET	+	Doses Returned	Edit Inventory reason pick list	manual
E	TRA	-	transfers out of inventory	Orders from or transfers from inventory	automated
F	TRA	-	Doses Transferred	Edit Inventory reason pick list	manual
G	Immunize	-	Immunizations Given	Imm is added to patient's record	automated
H	Delete	+	Immunizations Deleted	Imm is deleted from patient record	automated
I	ERR	+ or -	Error Correction	Edit Inventory reason pick list	manual
J	RECALL	-	Doses Recalled	Edit Inventory reason pick list	manual
K	ADMIN	-	Doses Administered	Edit Inventory reason pick list	manual
M	3	-	Spoilage reported by Provider	Edit Inventory reason pick list	manual
N	4	-	Expiration reported by Provider	Counts auto-generated when reports run	automated
O	5	-	Lost/damaged in transit to Provider	Edit Inventory reason pick list	manual
P	6	-	Failure to Store properly………..	Edit Inventory reason pick list	manual

Q	7	-	Refrigeration failure…………	Edit Inventory reason pick list	manual
R	11	-	Lost or Unaccounted for ………	Edit Inventory reason pick list	manual
S	12	-	Other - Not useable, per Provider	Edit Inventory reason pick list	manual
T	BORROWEDIN	+	Borrowed In	Edit Inventory reason pick list	manual
U	BORROWEDOUT	-	Borrowed Out	Edit Inventory reason pick list	manual
V	TRAEXP	n/a	Transfer out Expired Inventory	Transfer of Expired Inventory (i.e., back to mfg)	automated
W	BORROWED	-	Borrowed Imm Given	Borrowed Imm is added to patient record	automated
X	LOTDELETE	-	Lot Deleted	Edit Inventory Delete button	automated

Inventory Transactions within Vaccine Accountability Report columns

+ Starting Inventory	+ Doses Received	- Doses Reported	- Doses Expired	- Doses Spoiled	- Doses Wasted	- Doses Transferred Out	+ Ending Inventory	Accounted for Doses	Accounted for %
1	2	3	4	5	6	7	8	9	10
ending inventory from prior report run	A, B, C, D, T and I when positive	G*,W*, (H*)	N, V	M, P, Q	J, S, and I when negative	E, F, O, U, X	active, non-expired QOH per system		

Note that some transaction types are treated differently based on whether
they are accompanied by a valid vaccine eligibility code:

G*, W* = count if the immunization administered contains a vaccine eligibility
code
H* = Delete transaction of an immunization administered that contains a
vaccine eligibility code, which lowers the count of Doses Reported

Unaccounted for transactions: K, R, G**, W**, H**

G**, W** = unaccounted for if the immunization administered does not
contain a vaccine eligibility code
H** = Delete transaction of an immunization administered that does not
contain a vaccine eligibility code

Data Exchange Report

The Data Exchange Report Request screen allows users to run organization reports to monitor and manage their own data. The following user roles have access to the data exchange report request and status screens:

Standard User
Super User
E-Transfer Submission Only
Pharmacy Standard + E=transfer
System Administrator
Technical Staff
Operations Staff
Helpdesk/Trainer

To produce a Data Exchange Report:

11. Click **data exchange report** under the Reports section of the left menu panel. This will bring you to the Data Exchange Report Request screen:

Data Exchange Report Request

This report summarizes data exchange activity over a period of time. Please enter a data submission date range, i.e. analyze data submitted from 05/06/2018 to 05/31/2018.

Report Date Range: *From [ ] *To [05/06/2018]

Run Individual Reports for Selected Organization(s)

Organization Name
IR PHYSICIANS

[Add >]
[Add All >>]
[< Remove]
[<< Remove All]

Selected Organization(s)

[Generate] [Cancel]

12. Enter Report Date Range
    a. The from date cannot be prior to the Data Exchange Release date and must be on or after **05/06/2018**
13. Select the organization(s) that you would like included in the report from the left Organization Name list box.
    a. If you are logged in as a Group Organization, the list will be populated with the Group Organization and you're Child Organizations.

b. If you are logged in as an organization other than a Group Organization, the list box will prepopulate with your organization.

c. You can click or control+click to select which organization data to run reports on.

d. The "Add" button will add individually selected provider organizations.

e. You can control+click to select multiple organizations.

f. Selecting the "Add All" button will add all the organizations displayed.

g. Selecting the "Remove" button will remove individually selected organizations.

h. Selecting the "Remove All" button will remove all the organizations displayed.

14. To run the report select "Generate" button.

a. When you select the "Generate" button an individual report will be generated for each selected organization.

15. To cancel report select the "Cancel" button and you will be returned to main menu.

Data Exchange Report Status

After selecting the "Generate" button, the Data Exchange Report Status screen will display:

Data Exchange Report Status			Refresh
Report Name	**Started**	**Completed**	**Status**
IR PHYSICIANS	05/06/2018 07:00:13	05/06/2018 07:17:18	100%

1. Report Name

a. The report name is the organization name.

b. The name of each organization will display as a hyperlink.

c. Selecting the hyperlink will take you to the Excel spreadsheet report for the respective organization.

2. Started

a. The "Started" column displays the date and time the report started for each organization.

3. Completed

a. The "Completed" column displays the date and time the report was completed for each organization.

4. Status

a. The "Status" column displays the current status of each organization report.

b. Any % other than 100% is an approximation of how much of the data has been processed toward report completion.

c. 100% in the status column means the report is complete.

      d. Failed in the status column means the report was not able to run.
5. Refresh button
      a. Selecting the refresh button will refresh the report status field until a report is complete and status is 100%.

External Data Exchange Report

1. The Data Exchange Report generates an Excel file:

Data Exchange Report

ALIRPH / IR PHYSICIANS						Report Generated: 05/06/2018			
Date Range: 05/06/2018 - 05/06/2018									
DATA EXCHANGE SUMMARY									
IMMUNIZATION COUNTS					**PATIENT COUNTS**				
Accepted/Administered	18				Accepted	5			
Accepted/Historical	0				Pending	0			
Pending	0				Rejected	4			
Rejected	3								
Deleted	0								
Deducted	0								
QUERY COUNTS									
Queries Sent	1								
Single Match	1								
Multiple Match	0								
No Match	0								
ERROR COUNTS									
IMMUNIZATION & PATIENTS									
ERR 4 (Severity)	**Counts**	**%**	**ERR 8 (Description)**						
E	2		This immunization matches another immunization in incoming file.						
E	3		MESSAGE REJECTED - NO MSH SEGMENTS FOUND IN FILE						
E	2		<VALUE> is an invalid <CODE>						
E	1		Sending organization not recognized.						
E(ERROR) TOTAL	8	27%							
W	2		If supplied, <FIELD> should match constraint listed in spec.						
W	13		System Vaccine Lot information not available.						
W	2		Incoming Immunization vaccine lot (<LOT_NUMBER>) matched multiple lots.						
W	4		Informational error - No value was entered for <FIELD>						
W	1		Inventory Deduction skipped due to missing incoming Vaccine Lot.						
W(WARNING) TOTAL	22	73%							
I(INFO ONLY) TOTAL	0	0%							

2. On the Summary tab, the top left corner of the spreadsheet indicates the Org Code/Organization Name
3. The "Date Range" includes the "From" and "To" dates selected from the Data Exchange Report Request screen and defines the data included in the report.
4. The Report Generated date is the date the report was run.
5. The Data Exchange Summary section includes Immunization counts for:
      a. Accepted/Administered: Total number of accepted administered immunizations.
      b. Accepted/Historical: Total number of accepted historical immunizations
      c. Pending: Total number of pending immunizations.
      d. Rejected: Total number of rejected immunizations.
      e. Deleted: Total number of deleted immunizations.

    f.   Deducted: Total number of immunizations that were deducted from inventory.

6. The Data Exchange Summary section includes Patient counts for:
    a. Accepted: Total number of accepted patients.
        i. This sums the "Accepted" patients from the Job Detail screen under the 'check status' menu item.
        ii. This is not a unique count.
    b. Pending: Total number of pending patients.
    c. Rejected: Total number of rejected patients.

7. The Query Count section counts the number of VXQ records from HL7 version 2.3.1 and 2.4 and the number of QBP records from HL7 version 2.5.1.
    a. Queries Sent
    b. Single Match
    c. Multiple Match
    d. No Match

8. Error Counts for Immunizations and Patients section counts all error messages within each severity category with their percentage.
    a. E (error) – Transaction was not successful. The application rejected data that it views important. This could include required fields or the entire message.
    b. W (warning) – Transaction successful, but there may be issues. These may include non-fatal errors with potential for loss of data.
    c. I (Informational) – Transaction was successful, but includes returned information.

9. Total Counts for each Severity category will be a hyperlink and open into spreadsheet with details for the actual records that errored. You can also select the corresponding tab from the report summary worksheet to get the drill-down data.

10. Percentage of messages in each severity category as a fraction of all error message during the reporting timeframe.

11. ERR 8 (Description) displays the error description.

12. Drill-down worksheets
    a. Each severity category represented has its own worksheet.
        i. Errors
        ii. Warnings
        iii. Info Only

b. To get to the drill-down worksheet, from the Summary tab you can select the severity total hyperlink or select the tab from the bottom of the spreadsheet.

c. Each worksheet includes the following columns:

   i. Severity: this column provides the severity category found in HL7 ERR segment, sequence ERR-4, table # 0516

   ii. Issue Description: MSA-8

   iii. Message ID: this column provides the Message Control ID (sequence MSH-10) found in HL7 MSH segment

   iv. Patient Name: this column provides the patient name (sequence PID-5) found in HL7 PID segment

   v. Patient DOB: this column provides the patient date/time of birth (sequence PID-7) found in HL7 PID segment

   vi. Action Needed: When possible, this column will include the HL7 message segment where the error is located.

d. Example of Errors Tab

	Review & Take Action				
Rejection Errors					
Rejection errors are always serious and always require follow up and corrective action as soon as possible.					
Severity	Issue Description	Message ID	Patient Name	Patient DOB	Action Needed
E	This immunization matches another immunization in incoming file.	4545	SOAPY, AMY	01/01/2009	Correct and resubmit as high priority <RXA^1>
E	This immunization matches another immunization in incoming file.	4545	SOAPY, AMY	01/01/2009	Correct and resubmit as high priority <RXA^1>
E	Sending organization not recognized.	1	PATIENT, OREGON	01/01/2010	Correct and resubmit as high priority <MSH^1^4>
E	Zoster is an invalid Vaccine Group	1	PATIENT, ZOSTER	01/01/2010	Correct and resubmit as high priority <RXA^1^5^1^4>
E	MESSAGE REJECTED - NO MSH SEGMENTS FOUND IN FILE	N/A	N/A	N/A	Correct and resubmit as high priority <MSH^1^0>
E	MESSAGE REJECTED - NO MSH SEGMENTS FOUND IN FILE	N/A	N/A	N/A	Correct and resubmit as high priority <MSH^1^0>
E	MESSAGE REJECTED - NO MSH SEGMENTS FOUND IN FILE	N/A	N/A	N/A	Correct and resubmit as high priority <MSH^1^0>
E	HEPBLISAV-B is an invalid Trade Name	1	PATIENT, HEPLISAVB	01/01/2010	Correct and resubmit as high priority <RXA^2^5^1^4>

e. Example of Warnings Tab

	Review & Take Action				
Warning Errors					
Warning errors typically indicate that data may be missing or a message was only partially processed. These require review and corrective action. If the error indicates that important or required data was not stored or that there was an issue with VFC coding, inventory borrowing or other inventory issues, further investigation may be needed. Always start by looking at the patient record to determine if the issue described requires corrections to the patient and immunization records in ALERT IIS.					
Severity	Issue Description	Message ID	Patient Name	Patient DOB	Action Needed
W	Informational error - No value was entered for ORC-12.13	4545	SOAPY, AMY	01/01/2009	Correct as recommended, resubmit as needed <ORC^1^12^1^13>
W	Informational error - No value was entered for ORC-12.13	4545	SOAPY, AMY	01/01/2009	Correct as recommended, resubmit as needed <ORC^2^12^1^13>
W	If supplied, OBX-14 should match constraint listed in spec.	4545	SOAPY, AMY	01/01/2009	Correct as recommended, resubmit as needed <OBX^2^14>
W	Incoming Immunization vaccine lot (JIM01) matched multiple lots.	4545	SOAPY, AMY	01/01/2009	Correct as recommended, resubmit as needed <RXA^1^15^1>
W	Informational error - No value was entered for ORC-12.13	4545	SOAPY, AMY	01/01/2009	Correct as recommended, resubmit as needed <ORC^1^12^1^13>
W	Informational error - No value was entered for ORC-12.13	4545	SOAPY, AMY	01/01/2009	Correct as recommended, resubmit as needed <ORC^2^12^1^13>
W	If supplied, OBX-14 should match constraint listed in spec.	4545	SOAPY, AMY	01/01/2009	Correct as recommended, resubmit as needed <OBX^2^14>
W	Incoming Immunization vaccine lot (JIM01) matched multiple lots.	4545	SOAPY, AMY	01/01/2009	Correct as recommended, resubmit as needed <RXA^1^15^1>
W	System Vaccine Lot information not available.	1	PATIENT, ZOSTER	01/01/2010	Correct as recommended, resubmit as needed <RXA^2^15>
W	System Vaccine Lot information not available.	1	PATIENT, ZOSTER	01/01/2010	Correct as recommended, resubmit as needed <RXA^3^15>
W	System Vaccine Lot information not available.	1	PATIENT, ZOSTER	01/01/2010	Correct as recommended, resubmit as needed <RXA^4^15>
W	System Vaccine Lot information not available.	1	PATIENT, ZOSTER	01/01/2010	Correct as recommended, resubmit as needed <RXA^5^15>
W	System Vaccine Lot information not available.	1	PATIENT, ZOSTER	01/01/2010	Correct as recommended, resubmit as needed <RXA^6^15>
W	System Vaccine Lot information not available.	1	PATIENT, ZOSTER	01/01/2010	Correct as recommended, resubmit as needed <RXA^7^15>
W	System Vaccine Lot information not available.	1	PATIENT, ZOSTER	01/01/2010	Correct as recommended, resubmit as needed <RXA^8^15>
W	System Vaccine Lot information not available.	1	PATIENT, ZOSTER	01/01/2010	Correct as recommended, resubmit as needed <RXA^9^15>
W	System Vaccine Lot information not available.	1	PATIENT, ZOSTER	01/01/2010	Correct as recommended, resubmit as needed <RXA^10^15>
W	System Vaccine Lot information not available.	1	PATIENT, ZOSTER	01/01/2010	Correct as recommended, resubmit as needed <RXA^11^15>
W	System Vaccine Lot information not available.	1	PATIENT, HEPLISAVB	01/01/2010	Correct as recommended, resubmit as needed <RXA^1^15>
W	System Vaccine Lot information not available.	1	PATIENT, HEPLISAVB	01/01/2010	Correct as recommended, resubmit as needed <RXA^3^15>
W	System Vaccine Lot information not available.	1	PATIENT, HEPLISAVB	01/01/2010	Correct as recommended, resubmit as needed <RXA^4^15>
W	Inventory Deduction skipped due to missing incoming Vaccine Lot.	1	PATIENT, HEPLISAVB	01/01/2010	Correct as recommended, resubmit as needed <RXA^2>

f. Example of Info Only Tab

Review & Take Action					
Informational Errors					
Informational errors represent a variety of scenarios that may require follow up. Generally these errors are for information only, but if the error indicates an issue with data that is considered important to ALERT and/or to meet programmatic requirements (such as for the State Supplied Vaccine Program), further investigation may be needed. Always start by looking at the patient record to determine if the issues described requires corrections to the patient and immunization records in ALERT IIS.					
Severity	Issue Description	Message ID	Patient Name	Patient DOB	Action Needed