ALERT IIS: Manage your Active Patient population
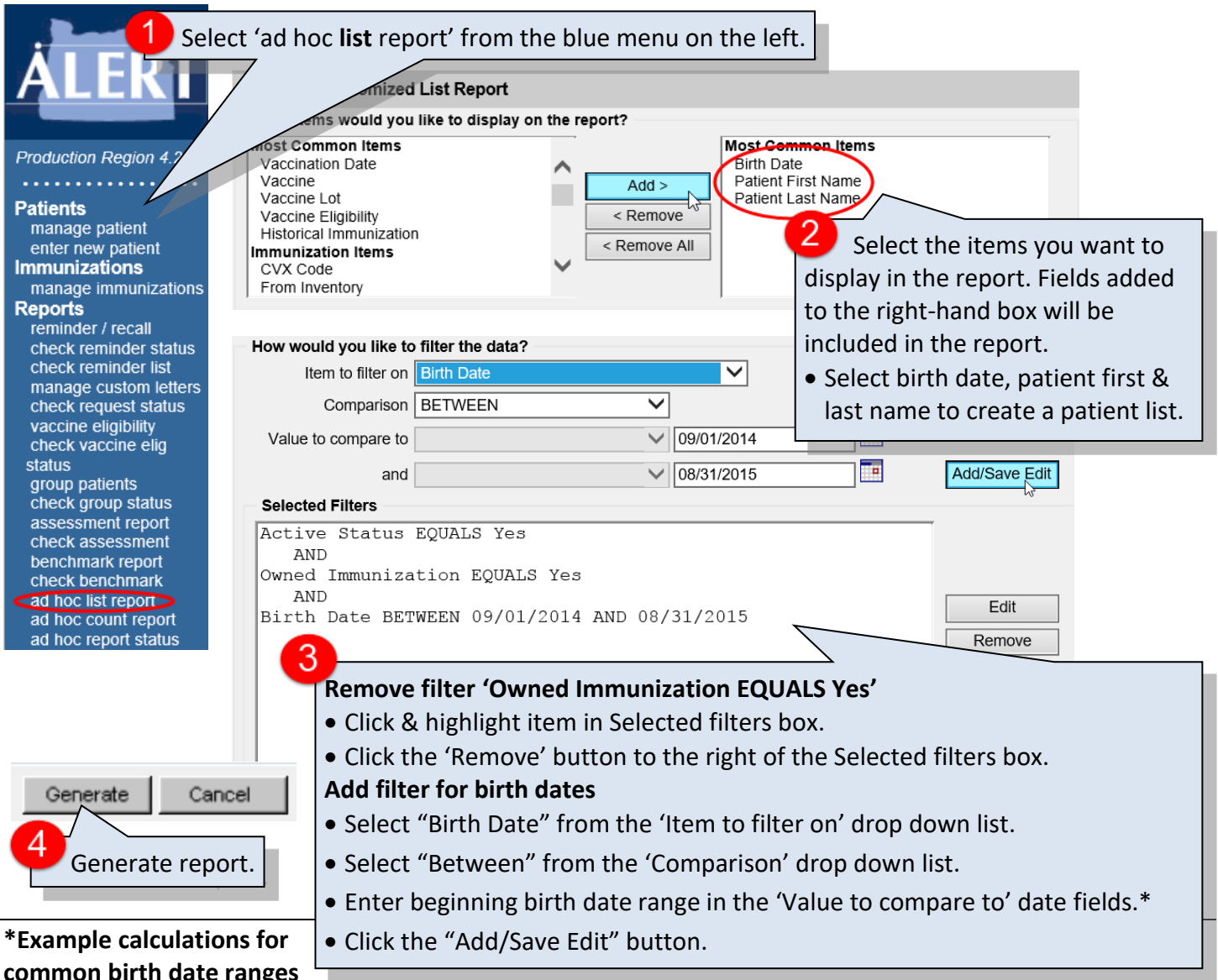
Who can access this report?	**This guide will address:**
• Oregon Immunization Program staff • ALERT Users with Standard or Super User access	• Using the Ad Hoc list report to generate a list of patients marked as active in ALERT IIS for the clinic location the user is associated with. • Inactivating patients who are no longer active patient at your clinic.

I. Create list of active patients using Ad Hoc List report

1 Select 'ad hoc **list** report' from the blue menu on the left.

Production Region 4.?

Patients
  manage patient
  enter new patient
Immunizations
  manage immunizations
Reports
  reminder / recall
  check reminder status
  check reminder list
  manage custom letters
  check request status
  vaccine eligibility
  check vaccine elig
  status
  group patients
  check group status
  assessment report
  check assessment
  benchmark report
  check benchmark
  ad hoc list report
  ad hoc count report
  ad hoc report status

...mized List Report

...ems would you like to display on the report?

Most Common Items
  Vaccination Date
  Vaccine
  Vaccine Lot
  Vaccine Eligibility
  Historical Immunization
Immunization Items
  CVX Code
  From Inventory

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

Most Common Items
  Birth Date
  Patient First Name
  Patient Last Name

2 Select the items you want to display in the report. Fields added to the right-hand box will be included in the report.
• Select birth date, patient first & last name to create a patient list.

How would you like to filter the data?

Item to filter on: Birth Date

Comparison: BETWEEN

Value to compare to: ___ 09/01/2014

and: ___ 08/31/2015

[Add/Save Edit]

Selected Filters

```
Active Status EQUALS Yes
    AND
Owned Immunization EQUALS Yes
    AND
Birth Date BETWEEN 09/01/2014 AND 08/31/2015
```

[Edit]
[Remove]

3

Remove filter 'Owned Immunization EQUALS Yes'
• Click & highlight item in Selected filters box.
• Click the 'Remove' button to the right of the Selected filters box.
Add filter for birth dates
• Select "Birth Date" from the 'Item to filter on' drop down list.
• Select "Between" from the 'Comparison' drop down list.
• Enter beginning birth date range in the 'Value to compare to' date fields.*
• Click the "Add/Save Edit" button.

[Generate] [Cancel]

4 Generate report.

*Example calculations for common birth date ranges

- Patients 24-35 months old as of August 31,2017: 09/01/2014 – 08/31/2015
- Patients 4-6 years old as of August 31, 2017: 09/01/2011 – 08/31/2013
- Patients 11-18 years old as of August 31,2017: 09/01/1999 – 08/31/2006

LIST	AMJEN MEDICAL CLINIC	09/21/2017 12:06 PM		PROCESSING	0

Once generated, the report will take a few minutes to complete during which time the report status will appear as 'processing'. The report will remain on the Ad Hoc Report Status page for two weeks.

Ad Hoc Report Status   Refresh   Cancel

Report Type	Provider Organization	Started	Com...	Status	Row Count
LIST	Oregon Immunization Program			DONE	0
LIST	AMJEN MEDICAL CLINIC			DONE	0
LIST	AMJEN MEDICAL CLINIC			DONE	10

⑤ • Click the refresh button until the report status appears as done.

⑥ • Click the 'LIST' hyperlink to see the report results.

Ad Hoc Report Results

What would you like to do with this report?

Export as Text   Export as a Spreadsheet   Display as a PDF

⑦ • Click the 'Export as Spreadsheet' hyperlink to open the report as an Excel document.

Report 307186

ALERT Immunization Information System
Report generated on 09/19/2017
Report generated by Kerry Lionadh
AMJEN MEDICAL CLINIC - AL9999 - Test10

Filter conditions used for this report:

Patients associated with AMJEN MEDICAL CLINIC

Active Status EQUALS Yes

AND

Birth Date BETWEEN 09/01/1999 AND 08/31/2006

II. Define criteria for removing active patients from your ALERT IIS clinic population

Inactivating patients who are no longer actively attending your clinic from your ALERT IIS active patients is the first step in managing a successful campaign to improve your immunization rates. Since ALERT IIS collects immunization visit data only and does not track other clinical encounters, inactivating patients based on time since last visit requires defining a strategy tailored to your specific clinic practices.

To ensure your active patients are not mistakenly inactivated from your ALERT IIS clinic population you may want to consider using medical and billing records to verify date of last service. If you base your criteria for inactivating patients solely on last immunization date in ALERT IIS, consider the following age-related factors.

1. **Children two and under** come in for regular well child visits. You may want to take into account how many well child visits a child has missed before inactivating them.
2. **Children 11 - 12 years old** likely had the last immunization visit for their kindergarten shots. You may want to keep active all children of this age group who last visited within a time period of **7 years**.
3. **Children 13-18 years old** likely had the last visit for their Tdap Booster. You may want to keep active all children of this age group who last visited within a period of **5 years**.

Other criteria for inactivating a patient from your active patient list.
1. Attempts to contact patient have been made and documented but no response was received from patient.
2. Patient is consistently receiving immunization services at another clinic.

III. Change patient status to inactive in ALERT IIS

1 Select 'manage immunizations' from the blue menu on the left.

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vaccine eligibility
check vaccine elig
status
group patients
check group status

ch Criteria

by **Patient**
um search criteria includes one field.

Last Name	Test	Mother's First Name		Find
First Name		Phone	- -	Clear
Middle Name				
Birth Date	01/01/2010 ✕ 📅			

2
- Enter search criteria such as last name and date of birth.
- Click the 'Find' button. You will be directed to the patient's immunization record.

Search by Patient ID
* Patient ID

Search by ALERT IIS ID
* ALERT IIS ID

Current Age: 7 years, 8 months, 20 days

Patient Notes (0) _view or update notes_

| Add New Imms | Add Historical Imms | Edit Patient | Reports | Print Record | Print Confidential Record |

Immunization Record

| Vaccine Group | Date Admin | Series | V |

3
- Click the 'Edit Patient' button located in the row of buttons at the top of the immunization record.
You will be directed to the patient's personal information page.

Personal Information

* Last Name	PATIENT	* Gender	M
* First Name	ENTERNEW	RemoveSSN	X
Middle Name	C	SSN	
Suffix		Medicaid ID	
		Birth Order	
* Birth Date	01/01/2010 📅 (provided by Vital Statistics)	Birth Country	U

4
- Click the arrow on the 'Organization Information' section of the page.
- Click on the most applicable option in the Status dropdown list.

Ma
* Mot

Last Upd

Patient AKA (3) ▼

Organization Information ▲

[back to top]

Status	ACTIVE
	INACTIVE-UNSPECIFIED
Provider- PCP	INACTIVE-NO LONGER A PATIENT
	INACTIVE-LOST TO FOLLOW UP
* Tracking Schedule	UNKNOWN
	DECEASED

Patient Identifiers

DEFINITIONS FOR INACTIVE STATUSES

Patient status	Definition
INACTIVE - UNSPECIFIED	Clinic users are discouraged from using this inactive status category.
INACTIVE – NO LONGER A PATIENT	Patient has moved out of the area, is receiving immunizations at another clinic, or signed a release of records.
INACTIVE – LOST TO FOLLOW UP	Multiple attempts to contact patient result in no response from patient.

| Save |
| History/Recommend |
| Reports |
| Cancel |

5 Click the 'Save' or 'History/Recommend' button to save changes.