

ALERT IIS: Ad Hoc Report overview

Who can access this report?

- Oregon Immunization Program staff
- ALERT IIS Standard or ALERT IIS Super Users

This guide will address:

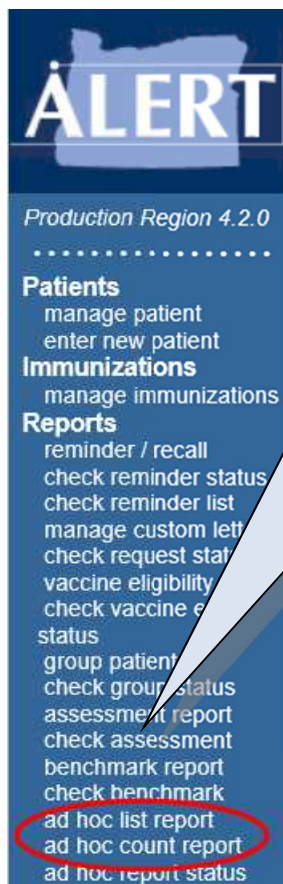
- The basic functionality of the Ad Hoc report
- Common Uses of the report

Ad Hoc reporting functionality is dynamic and flexible

Reports pull data from records of patients associated with your organization and can be built using any of the data elements associated with those records. The database is updated nightly so after making changes to patient records wait until the following day to run reports.

I. Choose a version of the report: List or Count

There are two versions of the Ad Hoc report which are used for different purposes.

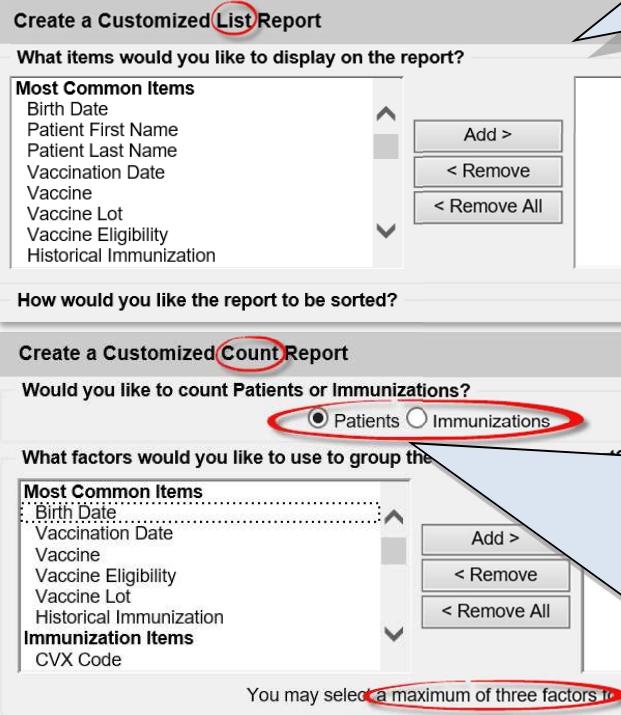


Select the version appropriate for your query from the menu bar on the left.

Ad Hoc **List** - Produces a list with patient and/or immunization information.

Common uses: 1) Review reported immunizations and whether they deducted from the IIS inventory module, 2) create an active patient list, 3) monitor data quality, e.g. "Were the correct vaccines reported?"

Unique features: 1) Look for 'List' in title at top of page, 2) select applicable items to display from toggle box at top of report set-up page, 3) export data set to Microsoft Excel for counting, sorting and filtering.



Ad Hoc **Count** - Produces counts of patients or immunizations.

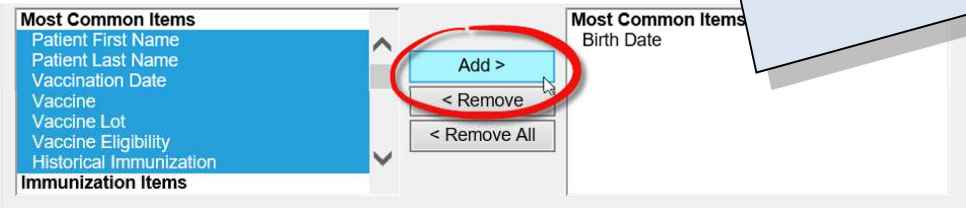
Common uses: 1) Count number of vaccines given within a certain timeframe with option to include additional details such as vaccine group, cvx, and VFC eligibility code.

Unique features: 1) Look for 'Count' in title at top of page, 2) select between counting patients or immunizations, 3) select up to 3 factors to count from toggle box at top of report set up page.

II. Report building: features of interest

a. Selecting items or factors from toggle box – Items/factors are the framework of the report. They are the elements from which your custom report will pull data.

- Add items or factors to your report - Select the item in the left list and click the 'Add' button to move the selection to the right list (Multiple items may be selected all at once by using the ctrl key).
- Remove items or factors from your report – Select the item in the right list and click the 'Remove' or 'Remove All' button.



b. Filters – adding, removing, grouping – Filters narrow the data pulled from the elements by specifying time frame or other variables like types of vaccine.

How would you like to filter the data?

Item to filter on: Vaccination Date

Comparison: EQUALS

Value to compare to: []

and: []

[Add/Save Edit]

Selected Filters

Active Status EQUALS Yes

AND

Owned Immunization EQUALS Yes

[Edit]

[Remove]

[And/Or]

[Group]

[UnGroup]

[Generate] [Cancel]

Generate report.

Add filters – 4 steps

- Select item to filter on.
- Select comparison.
- Enter value(s) to compare to.
- Click the 'Add/Save Edit' button (filter will appear in the selected filter list).

Remove filters –

- Select item in the 'Selected filters' box.
- Click the 'Remove' button.

Pre-selected filters – can be removed if needed.

Active Status EQUALS Yes – only includes patients in report that are active for your organization.

Owned Immunization EQUALS Yes – only includes immunizations reported by your organization (either given or reported as historical).

Group filters – Used to create groups of items (ex. – group multiple eligibility codes together to get a total count of VFC eligible doses).

III. Report status: accessing completed reports

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.

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

Production Region 4.2.0

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

Ad Hoc Report Status [Refresh](#) [Cancel](#)

Report Type	Provider Organization	Started	Completed	Status	Row Count
LIST	Oregon Immunization Program			DONE	0
LIST	AMJEN MEDICAL CLINIC	09/19/2017 05:00 PM	09/19/2017 05:01 PM	DONE	0
LIST	AMJEN MEDICAL CLINIC	09/19/2017 05:03 PM	09/19/2017 05:03 PM	DONE	10

Ad Hoc Report Results

What would you like to do with this report?
[Export as Text](#) [Export as a Spreadsheet](#)

Report 307186
 ALERT Immunization Information System
 Report generated on 09/19/2017
 Report generated by Kerry
 AMJEN MEDICAL CLINIC - ALS

Filter conditions used for this report:

Patients associated with AMJEN M
 Active Status EQUALS
 AND
 Birth Date BETWEEN 09/01/1999 AND 08/31/2006

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

• Click the 'LIST' or 'Count' hyperlink to see the report results.

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