ALERT IIS: Manage your Active Patient population

Who can access this report?
- Oregon Immunization Program staff
- ALERT Users with Standard or Super User access

This guide will address:
- 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- Inactivating patients who are no longer active patient at your clinic.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.

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.

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.

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

https://public.health.oregon.gov/PreventionWellness/VaccinesImmunization/ImmunizationProviderResources/Pages/provresources.aspx

| 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.

Ad Hoc Report Results

What would you like to do with this report?

Export as Text   Export as a Spreadsheet   Display as a PDF

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

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

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

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.

Patients
manage pa...
enter new ...ent
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

Search Criteria

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

Last Name | Test
First Name |
Middle Name |
Birth Date | 01/01/2010

Mother's First Name |
Phone | - -

Find
Clear

Search by Patient ID
* Patient ID

Search by ALERT IIS ID
* ALERT IIS ID

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.

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
* First Name | ENTERNEW
Middle Name | C
Suffix |
01/01/2010
* Birth Date | (provided by Vital Statistics)

* Gender | M
RemoveSSN
SSN
Medicaid ID
Birth Order
Birth Country

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

Last Upd...
Patient AKA (3) ▼

Organization Information ▲
[back to top]

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