ALERT IIS: Ad Hoc Report overview

| Who can access this report?	This guide will address:
• Oregon Immunization Program staff • ALERT IIS Standard or ALERT IIS Super Users	• 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

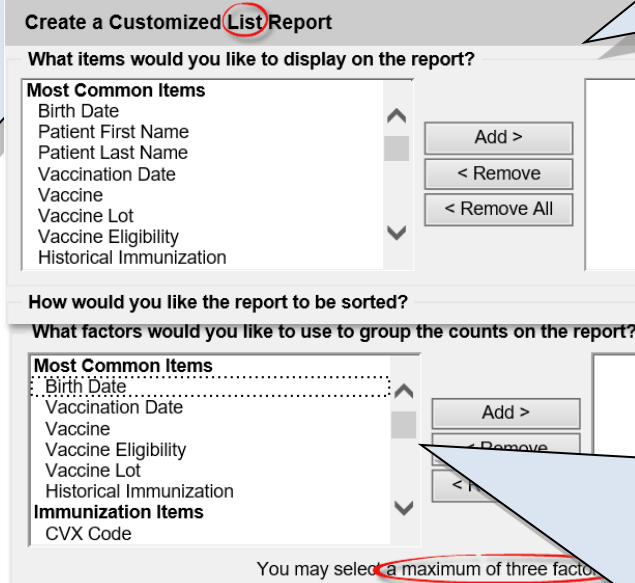There are two versions of the Ad Hoc report which are used for different purposes.
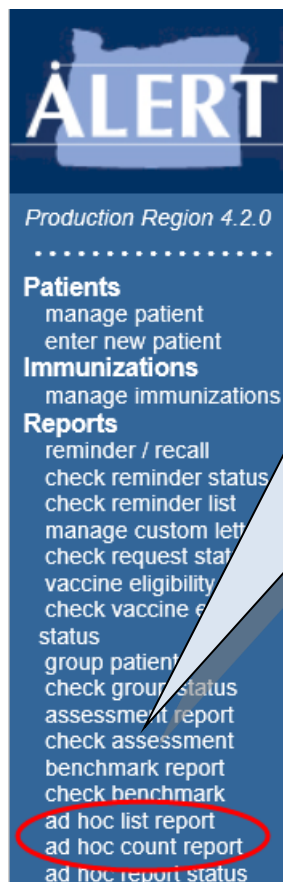
Select the version appropriate for your query from the menu bar on the left.

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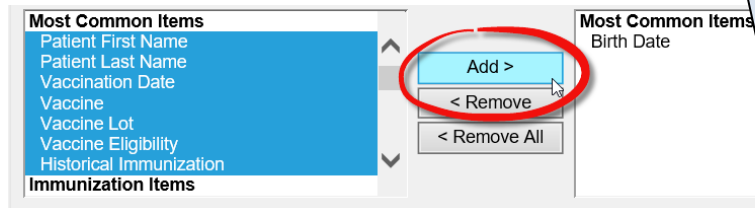**Common uses:** 1) Count number of vaccines given within a certain timeframe with option to include additional details such as vaccine group, cvx, and VFC eligibility code.

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.

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

Immunization Items

Add >
< Remove
< Remove All

Most Common Items
Birth Date

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

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).

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).

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

Generate   Cancel

Generate report.

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 |

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	...leted	Status	Row Count
LIST	Oregon Immuniza... Program		...M	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

- 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

Report 307186

ALERT Immunization Inform... System
Report generated on 09/19/20...
Report generated by Kerry...
AMJEN MEDICAL CLINIC - AL9...

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

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