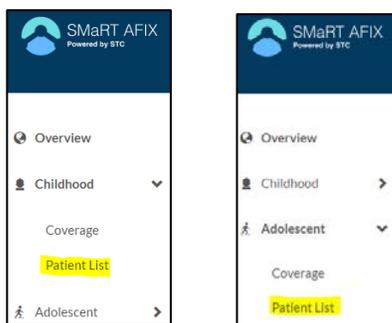![SMaRT AFIX Powered by STC]

Create a Patient List

A Patient List provides a list of the patients that are active with the facility, and can be used during an AFIX visit.
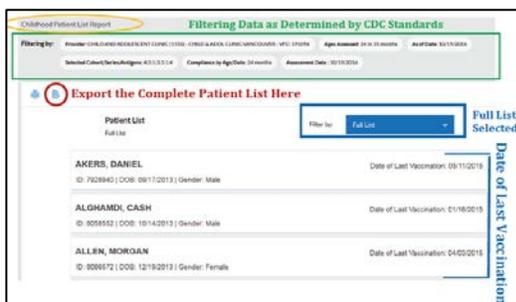
View a Patient List

1. Select the organization/facility in the search bar.

2. In the menu, select either **Childhood > Patient List** (for ages 24-35 months) or **Adolescent > Patient List** (for ages 13-17 years).

3. The Patient List Report page opens in table view with a truncated list of patients based on the filters pre-determined by CDC regulations, for that organization/facility, in alphabetical order. To export the complete list, in its entirety (not truncated), click the Export icon (📄). Exported patient lists contain additional information, including patient phone numbers.
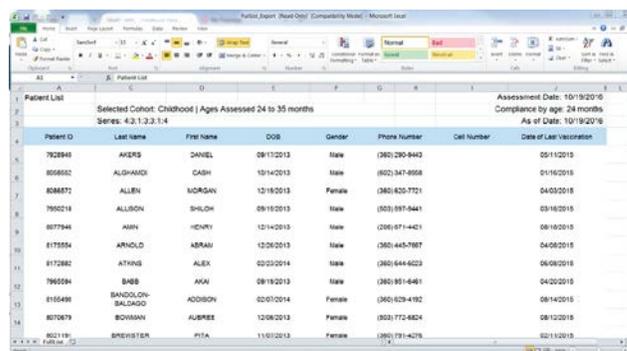

4. The report can also filter and list patients by Missed Opportunities and Invalid Doses. These options can help you keep your records updated more efficiently.
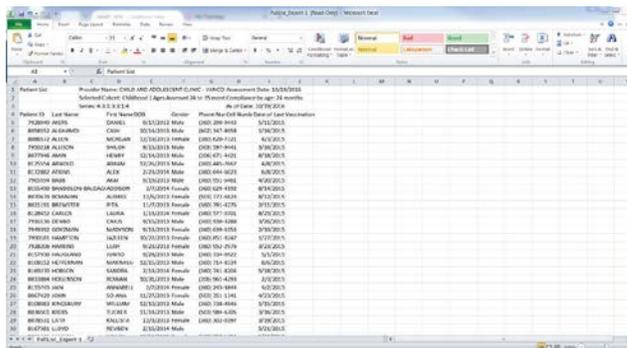

Export a Patient List

To export a patient list, click the **Export** icon (📄) and select either **CSV** or **XLS**. The report is saved to your computer. Exported files contain additional information not displayed on the screen, including patient phone numbers.

The image below is an example of data exported as an XML file into Microsoft Excel. The XLS option provides some preformatted options for ease in viewing.

The image below is an example of data exported as a CSV file and opened in Excel. The CSV file is not preformatted, making sorting and filtering by the user in Excel unobstructed by formatting. The user can sort, filter, and reformat in Excel.

Print a Patient List

To print a patient list, click the Print icon (🖨️) and follow the prompts to select your local printer.